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**REVISTA UNIVERSITARĂ DE SOCIOLOGIE**  
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**REVUE UNIVERSITAIRE DE SOCIOLOGIE**

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## TABLE OF CONTENTS

<b>Preface</b>	12
The Role of Implicitness in (Inter)Cultural Competence in a University Context <b>Abdellah MOULAY OMAR, Hamza HEZABRA, Abdelkader MAKHLOUF (Algeria)</b>	14
Strategies for Using Didactics to Improve Integration Situations in the Educational System <b>Belaidouni LAKHDAR (Algeria)</b>	26
Design of a Forum Theater Script on the Issue of Drug Use <b>Andreea Valeria ANDRAȘ (CRIȘAN) (Romania)</b>	38
Empowering Educators: A Sociological Analysis of Work Engagement in Timiș County <b>Ionela – Andreea STOICOV (Romania)</b>	50
Loneliness Between Structural Objectivity and Lived Subjectivity: An Integrative Analysis of Contemporary Sociological Theories <b>Vlad Ovidiu CIOACĂ (Romania)</b>	60
The Impact of Motivation on Job Satisfaction Levels Among IT Technicians <b>Mihaela Luminița SANDU, Maria PESCARU (Romania)</b>	77
Students' Perceptions of School as an Inclusive Learning Environment: A Case Study of Senior Students in Mehedinți County, Romania <b>Oana AMZA, Daniel GREBELDINGER (Romania)</b>	89
Doctoral Students' Perspectives on Learning English as a Complementary Module in Algeria: An Exploration of Challenges and Recommendations <b>Asma MERINE (Algeria)</b>	98
Theoretical Foundations and Legal Developments in Contemporary Corporate Governance <b>Mădălina OTOVESCU (MORMOE) (Romania)</b>	111
Cybersecurity Readiness in Algeria: An Assessment of Infrastructure, Legislation, and Crisis Management <b>Fatima DAHMANI, Abderrezzaq BRADA (Algeria)</b>	130
The Historical Transformation of the Relationship Between Public Administration and Civil Society: From Authority to Dialogue <b>Dan ARDELEAN (Romania)</b>	140
Optimizing Assistive Interventions for the Psychosocial Development of Students With Special Educational Needs (SEN) <b>Oana-Maria RĂDULESCU (Romania)</b>	155



Self-Perceived Stress and Its Impact on Counterproductive Work Behaviors Among Employees in the Hospitality Industry <b>Mihaela RUS, Cristina-Maria PESCARU (Romania)</b>	160
The Role of Social Media in Structuring Beauty Standards <b>Alexandra Anamaria PREDA (Romania)</b>	171
Mental Health in Romania: The Legislative Framework Between Normative Progress and Systemic Dysfunctions <b>Corina FUSAREA (Romania)</b>	175
The Influence of Isomorphic Pressures From Public Funding Programs on the Emergence of Social Enterprises in Romania <b>Mihaela VEȚAN, Daniel GREBELDINGER (Romania)</b>	189
Crisis Resolution Mechanisms Among the Omvang (Eastern Cameroon): Traditional Diplomacy in the Service of Peace Promotion <b>Carin ZE AYE (Cameroon)</b>	204
Note-Taking in Consecutive Interpreting: Techniques and Training Obstacles <b>Sarra KHALFI, Rachida BESSAFI (Algeria)</b>	213
The Perception of Young People Regarding Marriage and Cohabitation <b>Iulia NEȘA, Mariana BALACI (Romania)</b>	219
Constructing Aspirational Identity Through Consumption: A Sociological Perspective on Generations X, Y, and Z <b>Gabriel Viorel LUPU (Romania)</b>	239
Bureaucracy and Its Functional Deviations: From Max Weber to the Critique of Biopathology <b>Adrian OTOVESCU, Răzvan NEACȘU (Romania)</b>	244
Brain drain and migration of Cameroonian health professionals to developed countries <b>Emmanuel LINGOK (Cameroon)</b>	253
The Role of Interpersonal Relationships in Shaping Professional Life <b>Ileana Simona DABU, Valentina Cătălina BOBOCEL (Romania)</b>	265
From Stigma to Style: Tattooing and the Transformations of Social Status <b>Valentina-Violeta LEFF (Romania)</b>	274
Organizational Culture and Leadership <b>Miroslava QUANITTA ȘTEFANIA (Romania)</b>	280
The Role of Self-Esteem in Managing Academic Stress within the Social Context of the COVID-19 Pandemic <b>Sorin PRIBAC, Diana Maria POPESCU (Romania)</b>	287

Comparative Social History: The Formation of National Culture in Romania and Portugal	295
<b>Adrian OTOVESCU, Andrei JILCU (Romania)</b>	
The Impact of Artificial Intelligence Systems on Guest Experience and Satisfaction in hotels. Case study: Israeli	304
<b>Marius VASILUȚĂ-ȘTEFĂNESCU, Sapir LEVI (Romania)</b>	
Gender Representation in Leadership and Gender Equality Policies: A Comparative Study of Romania and the European Union	315
<b>George Marian ICHIM (Romania)</b>	
Models of Internal Party Democracy: Comparative Lessons from Four Advanced Democracies for Eastern Europe	329
<b>Dorin-Cosmin VASILE, Vlad Ovidiu CIOACĂ (Romania)</b>	
How satisfied are travelers? Perceptions of public transport in Timisoara	340
<b>Ovidiu-Florin SENDRONI, Marius VASILUȚĂ-ȘTEFĂNESCU (Romania)</b>	
Gender and Future Employability: Insights from Male and Female Students at the West University of Timișoara, Romania	350
<b>Vasile Lucian DRINC (Romania)</b>	
Self-Medication in Romania: An Analysis through the Lens of the Health Belief Model	360
<b>Cosmin-Constantin SICREA (Romania)</b>	
The Role of Students' Emotional Attachment in Predicting Perceived Teaching Effectiveness	368
<b>Maria PESCARU, Mihaela Luminița SANDU (Romania)</b>	
<i>Book Review: Bogdan Nicolae Mucea (2023), Ocupații, angajament organizațional și resurse umane. O altă perspectivă de abordare, Tritonic, București, 164 p.</i>	379
<b>Marius Sabin MORAR (Romania)</b>	

## Preface

After two decades during which the *University Journal of Sociology* has served as an important reference point for both the Romanian and international academic communities, we are opening the 21st year of publication (2025) with a new stage marked by a rethinking of the journal's profile and image. Our editorial team thus meets its readers and contributors with significant updates, both in terms of editorial structure and regarding design and scientific standards.

This new issue inaugurates a redesigned cover that reflects our commitment to the relevance and timeliness of contemporary sociological research. In the same spirit of renewal, we have updated and expanded our editorial board, including established scholars from both Romania and abroad, with the goal of strengthening the journal's interdisciplinary and international orientation.

At the same time, we have placed increased emphasis on reinforcing the peer review procedures, thereby reaffirming our ongoing commitment to academic excellence and the methodological rigor of published materials. All these efforts contribute to consolidating the journal's status as a leading platform for timely and meaningful scientific debate.

This issue brings together articles of high sociological value, covering a wide array of themes that are coherently integrated into the journal's broader vision. From studies on intercultural competence in academic settings to analyses of corporate governance systems, the impact of artificial intelligence, and the social transformations generated by new technologies, the journal continues its multidisciplinary tradition and sustained interest in pressing contemporary issues.

We are confident that these changes will enhance the journal's visibility and relevance, in line with the evolving expectations of international sociological research. We invite authors and readers to join us in this new stage of editorial rebranding and consolidation, assuring them that the *University Journal of Sociology* will remain a central forum for contemporary academic dialogue.

This first issue of the 21st year (2025) of the *University Journal of Sociology* brings together valuable academic contributions that reflect the thematic and methodological diversity of contemporary sociology. In line with our editorial tradition, the volume transcends the boundaries of a conventional scientific journal, offering readers a coherent and integrative framework for understanding the challenges facing today's societies.

The authors published in this issue represent a significant diversity of geographical regions, sociological subfields, and analytical approaches. Thematically, the journal addresses topics from well-established branches of sociology, such as the sociology of education and culture (Abdellah Moulay Omar et al.; Belaidouni Lakhdar; Asma Merine), the sociology of organizations and work (Ionela-Andreea Stoicov; Mihaela Luminița Sandu and Maria Pescaru; Mihaela Rus and Cristina-Maria Pescaru; Miroslava Quanitta Ștefania, Ileana Simona Dabu and Valentina Cătălina Bobocel), the sociology of health (Corina Fusarea; Cosmin-Constantin Sicrea; Emmanuel Lingok), the sociology of communication and mass media (Alexandra Anamaria Preda), the sociology of law (Mădălina Otovescu/Mormoe), political sociology (Dorin-Cosmin Vasile and Vlad Ovidiu Cioacă; Dan Ardelean), the sociology of development and social innovation (Mihaela Vețan and Daniel Grebeldinger), the sociology of the family (Iulia Neșa and Mariana Balaci; Vasile Lucian Drinc), the sociology of culture (Valentina-Violeta Leff; Gabriel Viorel Lupu), as well as relevant case studies from urban sociology (Ovidiu-Florin Sendroni and Marius Vasiliuță-Ștefănescu).

Numerous articles stand out through a strongly interdisciplinary approach, combining sociological analysis with psychological, economic, or legal perspectives, thereby enhancing both their scientific added value and practical applicability. Studies dedicated to the impact of motivation on IT technicians' job satisfaction, perceived stress in the hospitality industry, or the analysis of artificial intelligence systems in the hotel sector offer integrative perspectives that go beyond the boundaries of traditional sociology.

The methodological diversity is equally noteworthy: ranging from quantitative studies and in-depth qualitative analyses to international comparative research, the published articles draw on a wide array of rigorous sociological techniques. Contributions by authors from Romania, Algeria, Cameroon, and Israel emphasize both the global relevance of the topics addressed and the necessity of ongoing intercultural dialogue in contemporary sociology.

The editorial team welcomes contributions that foreground critical reflection on bureaucratic mechanisms (Adrian Otovescu and Răzvan Neacșu), the role of isomorphic pressures in the development of social enterprises, or the relevance of diplomatic traditions in conflict management (Carin Ze Aye). We also highlight analyses of youth perceptions of conjugal relationships, the importance of emotional attachment in teaching effectiveness, and the investigation of academic stress in the context of the pandemic.

**The editorial board**  
**31.05.2025**

# The Role of Implicitness in (Inter)Cultural Competence in a University Context

**Abdellah MOULAY OMAR**

Laboratoire LAILEMM, Université de Bejaia (Algeria)

Email : abdellahmoulayomar@gmail.com

**Hamza HEZABRA**

Laboratoire LeFEU, Université de Ouargla (Algeria)

Email: hezabra.h@gmail.com

**Abdelkader MAKHLOUF**

NourBachir University Center, Elbayadh (Algeria)

Email: a.makhlouf@cu-elbayadh.dz

**Abstract:** *This study aims to explore the implicit teaching and learning of (inter)cultural competence among Algerian students of the French language. To this end, we involved thirty first-year undergraduate students of French at the University of Adrar (Algeria) in a flipped classroom experiment, which we regard as an innovative pedagogical approach to fostering the implicit development of (inter)cultural competence. Our hybrid methodology unfolded in two stages: remote and in-person. During the remote phase, students watched authentic video clips and completed computerized quizzes on topics related to French culture. During the in-person sessions, we addressed students' misunderstandings at the beginning of each class. Subsequently, we provided them with textual materials that covered the same themes as the video clips they had watched. These textual materials served as a basis for debates initiated after each cultural text reading. At the conclusion of the experiment, we asked the participating students to complete a digital feedback questionnaire to assess their perspectives on the teaching and learning of (inter)cultural competence within the Algerian university context and to gather their evaluations of the flipped classroom experience. Preliminary results from this experiment indicate a notable openness and acceptance among Adrar-based French language students toward the teaching and learning of foreign cultures, particularly French culture.*

**Keywords:** *flipped classroom; pedagogical innovation; (inter)cultural competence; implicit teaching and learning; Algerian students of French.*

## 1. Introduction

The sociolinguistic, historical, and cultural ties between Algeria and France continue to fuel debates about the integration of (inter)cultural competence in foreign language education, particularly in French language studies. In Algerian universities, the French language curriculum prioritizes the development of (inter)cultural competence, beginning in the first year of the bachelor's program. Courses such as *Cultures and Civilizations of the Language*, *Introduction to Literary Texts*, *French Literature*, and *Reading and Study of Texts* emphasize the intersection of language and culture. At the Master's level, many institutions offer a specialized "Literature and Civilization" track, further reflecting the importance of this relationship.

Language education inherently involves cultural content, as the two are inseparable. Scholars such as Benveniste (1976) describe language and culture as "two sides of the same coin," while Blanchet (2004, as cited in Khelladi et al., 2020: 83) asserts that "learning a language is learning a culture." These perspectives underscore the necessity of incorporating cultural elements into French as a Foreign Language

(FLE) education to develop students' (inter)cultural competence, a growing focus among educators (Hezabra & Hamlaoui, 2024).

### ***Problem of the Study***

Despite the recognized importance of (inter)cultural competence, its explicit integration into FLE curricula within Algerian universities can encounter resistance due to cultural sensitivities or conflicts. Such challenges are particularly pronounced in the University of Adrar, where cultural context and traditional norms often influence educational practices. Explicit teaching methods may provoke cultural shocks, hindering the effectiveness of FLE education. This highlights the need for innovative pedagogical approaches that subtly introduce (inter)cultural concepts without direct confrontation, fostering both cultural understanding and acceptance among students.

### ***Importance of the Study***

This study addresses the critical need to balance cultural sensitivity with the effective development of (inter)cultural competence in Algerian universities. By introducing the flipped classroom as a pedagogical innovation, the research explores a method that promotes implicit teaching and learning of cultural elements. This approach is designed to help students in Adrar recognise cultural differences, correct misconceptions, and cultivate an openness to other cultures while reinforcing awareness of their own. The study contributes to the fields of Language Didactics (DDL) and Language Sciences (SDL) by offering an innovative framework for addressing a pressing educational challenge.

### ***Purpose of the Study***

The study aims to examine how implementing the flipped classroom in the context of oral comprehension and expression sessions can implicitly enhance (inter)cultural competence among FLE students at the University of Adrar. By adopting this approach, the research seeks to minimize resistance, encourage cultural sensitivity, and foster a deeper understanding of both self and others. Ultimately, the study aims to provide a replicable model for higher education institutions in similar sociolinguistic contexts.

### ***This leads to the central research question:***

To what extent can the implementation of the flipped classroom in an Adrar university context promote the implicit teaching and learning of (inter)cultural competence in oral comprehension and expression sessions?

Based on this question, the study hypothesizes that pedagogical innovation through the flipped classroom can effectively promote the implicit teaching and learning of (inter)cultural competence in these sessions. By addressing this hypothesis, the study contributes to enhancing FLE education and strengthening the cultural dimensions of language learning in Algerian universities.

## **2. Research in context**

This study centers on oral competence, focusing on both reception and production. It is situated within the domains of applied linguistics and (inter)cultural didactics. The primary objective is to teach and implicitly develop (inter)cultural competence among French-language students. To achieve this, we target a group of 33 first-year students enrolled in the French-language Bachelor's program at the University of Adrar (Algeria).

The University of Adrar, established in 1986, is the first higher education institution in the province of Adrar<sup>1</sup>. Its creation marked a significant milestone, offering young Adraris the opportunity to pursue advanced education and scientific training locally. Over time, the university's research units have contributed to its emergence as a prominent institution in Algeria's vast southwestern region.

The French department at the University of Adrar began its operations during the 2011–2012 academic year. Currently, the department hosts over 200 students pursuing degrees in the Bachelor of French Language program and the Master of Didactics of French as a Foreign Language (FLE).

### **3. Theoretical and Conceptual Framework**

#### **3.1. Innovative Teaching**

In the Algerian university context, the need for educational innovation surged following the outbreak of the coronavirus pandemic in March 2020. This global health crisis compelled Algerian educators to adopt innovative teaching practices and adjust their pedagogical approaches to ensure the continuity of distance or hybrid learning (Moulay Omar & Sakrane, 2023a; Moulay Omar & Sakrane, 2023b).

Defining educational innovation remains a challenge for some researchers (Cros, 1997; Lison et al., 2014; Ait Dahmane, 2021), as there is no universally agreed-upon definition. However, Françoise Cros (2020: 31), a specialist in the field, offers a valuable perspective:

Innovation [-educational] is unquestionably a change, but not just any change. For [pedagogical] innovation, the change is voluntary, intentional and deliberate, that is to say a change invested with a certain expectation, chosen knowingly, at a deliberate moment and part of a process of development of the desire to transform training [towards the best].

This definition highlights that pedagogical innovation involves a deliberate decision by educators to implement positive changes that enhance teaching and learning processes. Its ultimate goal is to “substantially improve the learning of students in situations of interaction and interactivity” (Lameul & Loisy, 2014: 70).

In our study, the flipped classroom is introduced as an example of pedagogical innovation. It is utilized to facilitate the implicit development of (inter)cultural competence in FLE classrooms, particularly in sessions focused on oral comprehension and expression for French department students at the University of Adrar.

To clarify the underlying principles of this innovation, the following sections will define the flipped classroom and explain its operational framework within a contemporary academic setting.

#### **3.2. Innovative Pedagogical Strategies: The Flipped Classroom Model**

The flipped classroom model has emerged as a transformative approach to education, prioritizing active student engagement and leveraging technology to enhance learning experiences. This method involves students engaging with instructional content outside the classroom, typically through digital resources such as videos and readings, and subsequently applying their knowledge in interactive, in-class activities. Studies highlight that this model not only fosters active learning but also promotes deeper understanding, reflection, and inquiry, particularly when

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<sup>1</sup>According to the website of the Agence Universitaire de la Francophonie (AUF): [https://www.auf.org/les\\_membres/nos-membres/universite-ahmed-draia-dadradr/](https://www.auf.org/les_membres/nos-membres/universite-ahmed-draia-dadradr/) consulted on 30/06/2024.

integrated with innovative teaching strategies. By shifting the focus from passive reception to active participation, the flipped classroom model addresses the evolving needs of modern education.

Recent research underscores the positive outcomes associated with the flipped classroom approach, particularly in specialized fields such as physics and mechanical engineering education. For instance, systematic reviews reveal significant improvements in student achievement, motivation, and affective outcomes compared to traditional teaching methods (Tunggyshbay et al., 2023; Haralanova & Fafner, 2023). Pre-class activities often involve multimedia resources, quizzes, and preparatory readings, while in-class sessions emphasize collaborative problem-solving, discussions, and hands-on experiments. These strategies create a more student-centered learning environment, aligning with the demands of Industry and preparing students for the complexities of modern professional landscapes.

The benefits of the flipped classroom extend beyond academic performance, encompassing social, digital, and health domains. The approach provides students with greater autonomy and flexibility in managing their learning while fostering meaningful interactions with peers and instructors. During the COVID-19 pandemic, the flipped classroom model proved particularly advantageous, facilitating continuity in education and offering a robust framework for deep learning amidst unprecedented challenges (Analysis of the Flipped Classroom Model as a Proposal for Teaching Innovation, 2022). Furthermore, its integration of information and communication technologies equips students with skills vital for academic and career success in the digital age (Cevikbas & Argün, 2017).

However, the adoption of the flipped classroom model is not without challenges. Concerns about increased student workload, unclear learning outcomes, and initial barriers to active participation have been documented (Fuchs, 2021). Educators are advised to provide clear guidelines, structured activities, and continuous feedback to address these issues effectively. Proper planning and support are essential to mitigate potential obstacles and ensure that the transition to this innovative teaching method enhances rather than hinders student learning experiences.

As an educational innovation for the 21st century, the flipped classroom model continues to gain traction across diverse disciplines and educational contexts. Its capacity to bridge the gap between traditional and modern pedagogies makes it a promising approach for addressing the evolving demands of learners. With ongoing research and refinement, the flipped classroom has the potential to redefine teaching and learning paradigms, fostering a generation of students who are better equipped to navigate the challenges of an ever-changing world.

### **3.3 The Flipped Classroom Infographic**

The flipped classroom, also known as the flipped classroom, is a hybrid teaching approach that reverses the traditional teaching process. In this model, theoretical content is studied remotely, while practical activities are conducted in the classroom (Bergmann & Sams, 2014; Moulay Omar & Sakrane, 2023b). Julie Lecoq and Marcel Lebrun (2016) define it succinctly as: "Lectures at home and Homework in class" (Lecoq & Lebrun, 2016: 7).

To achieve effective hybridization in the flipped classroom, teachers must use Information and Communication Technologies (ICT). These technologies act as mediators between teachers and students during the remote learning phase. In our study, we utilized the Google Classroom platform provided by the University of Adrar (Algeria). Educational content was uploaded in the form of authentic video capsules,



accompanied by four computerized quizzes to assess students' understanding after each viewing.

The video capsules and quizzes covered four themes related to French culture: education against racism and anti-Semitism, the pride of the French in their cuisine, the French education system, and the Francophonie and intercultural dialogue. These resources offered students an engaging introduction to French culture. During the in-person sessions, we employed a debate format. Students discussed the video content, which explicitly enhanced their oral comprehension and expression. Additionally, this approach implicitly fostered their (inter)cultural knowledge and skills.

### **3.4 (Inter)cultural Competence**

Meunier (as cited in Chaves et al., 2012: 12) defines intercultural competence as follows: "Intercultural is a way of analysing cultural diversity [...]. It is above all an approach, an analysis, a look and a way of questioning cultural interactions." From this perspective, (inter)cultural competence is not limited to teaching content. Instead, it represents a practical approach that builds connections between cultures. It is about "building bridges, links between cultures" rather than simply imparting knowledge (Chaves et al., 2012: 12).

The essence of (inter)cultural competence lies in embracing diverse perspectives. It encourages shifting from cultural rejection to appreciating cultural richness. In education, the (inter)cultural approach helps learners challenge stereotypes and relativize their representations and prejudices. This process fosters better communication by combining knowledge, attitudes, and interpersonal skills (know-how and know-how-to-act). Ultimately, this approach aims to develop the attitudes and abilities needed to explore diversity and build meaningful relationships with others.

#### **Reasons for the Lack of (Inter)cultural Teaching in Universities**

1. Lack of adequate teacher training;
2. Unofficial approaches that are not integrated into curricula;
3. Errors in the application of methods;
4. Other challenges (e.g., institutional or resource-based limitations).

#### **Essential Intercultural Skills for Teachers**

1. The ability to establish connections between native and foreign cultures;
2. The ability to apply diverse strategies for effective communication;
3. Acting as a cultural mediator to address misunderstandings and conflicts;
4. Moving beyond superficial or stereotyped relationships;
5. Developing cultural awareness and understanding;
6. Other related skills as required.

### **4. Method**

Two groups of students (G1 and G2) participated in our experiment, which spanned four weeks. During this period, we implemented the flipped classroom method, recognized as an educational innovation (Lebrun & Lecoq, 2015). This approach aimed to implicitly develop the (inter)cultural competence of first-year French Language Bachelor's students at Ahmed Draia University in Adrar. The experiment followed a hybrid format, combining face-to-face and remote activities.

For the remote component, we uploaded four authentic video clips onto the Google Classroom platform used by the French department at the University of Adrar. These clips, tailored for the two experimental groups, covered diverse themes related

to French culture. After watching each video, students completed computerized quizzes designed to assess their comprehension.

In the face-to-face sessions, students engaged in debates on the content of the video clips. These discussions aimed to verify their awareness of cultural differences between their own culture and French culture. We also sought to determine whether students developed (inter)cultural competence and openness without resistance toward French culture, the focal point of our study.

These in-person interactions provided opportunities to support students in refining their (inter)cultural competence. We addressed misconceptions and clarified misrepresentations regarding France, the French education system, the French language, and French culture. This approach aimed to encourage a nuanced understanding of cultural diversity.

### **5. Presentation and Analysis of Results**

In this section, we present the findings from the first five questions of the final feedback questionnaire. This questionnaire was designed to gather students' assessments of their experiences and evaluate their perspectives on the implicit teaching of (inter)cultural competence within the Algerian university context, specifically at the University of Adrar.

The questionnaire included five closed-ended, multiple-choice questions (with only one answer allowed). The questions were:

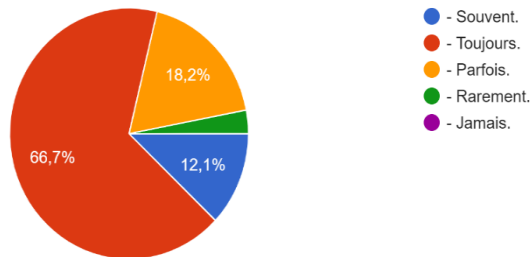
- a) Q.01 - Has your teacher's method allowed you to develop your cultural knowledge?
- b) Q.02 - Did your teacher's method help you get to know French culture?
- c) Q.03 - Based on the video clips you watched, is French culture different from Algerian culture?
- d) Q.04 - Are you for or against learning about French culture?
- e) Q.05 - Could learning about French culture help you improve your French language skills?

In the subsequent sections, we analyze students' responses to these questions using a quantitative approach.

### Q.01 - Has your teacher's method allowed you to develop your cultural knowledge?

Q.01- La méthode de votre enseignant vous a-t-elle permis de développer vos connaissances culturelles ?

33 réponses



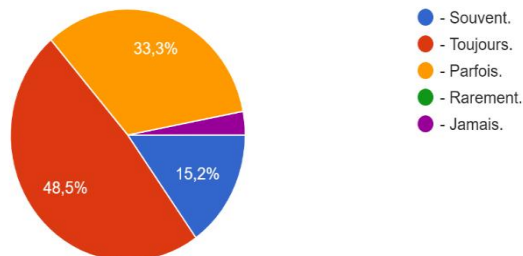
**Figure 1: Results of the first question of the final questionnaire**

The results of the first question of the final feedback questionnaire indicate that all students answered this question, 33 out of 33 students, or 100%. Most students stated that the teaching-learning method adopted allowed them to develop their cultural and intercultural knowledge. Indeed, 28 out of 33 students responded with "Often" and "Always", or 78%. And 08 out of 33 students responded with "Sometimes" and "Rarely", or 22%.

### Q.02- Did your teacher's method help you get to know French culture?

Q.02- La méthode de votre enseignant vous a-t-elle aidé à découvrir la culture française ?

33 réponses



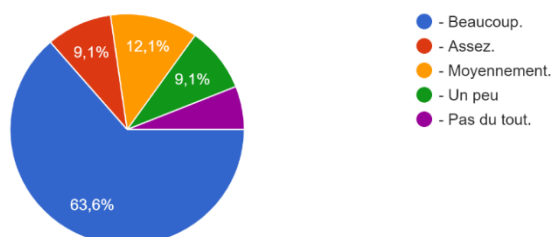
**Figure 2 : Results of the second question of the final questionnaire**

The responses to the second question indicate full participation, with all 33 students (100%) providing answers. A majority found the teacher's method effective in helping them discover French culture. In detail, 23 out of 33 students (64%) responded with "Often" or "Always." On the other hand, 13 students (36%) selected "Sometimes" or "Never."

### Q.03- According to the video clips you watched, is French culture different from Algerian culture?

Q.03- D'après les capsules vidéos que vous avez visionnées, la culture française se différencie-t-elle de la culture algérienne ?

33 réponses



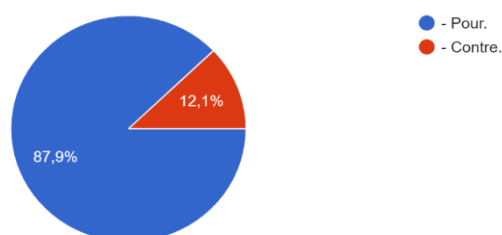
**Figure 3 : Results of the third question of the final questionnaire**

The responses to the third question show that all students (100%) participated. A significant majority acknowledged substantial differences between Algerian and French culture after watching the video clips. Specifically, 26 out of 33 students (72%) answered "A lot" or "Enough." Meanwhile, 10 students (28%) chose "Moderately," "A little," or "Not at all."

### Q.04- Are you for or against learning about French culture?

Q.04- Êtes-vous pour ou contre l'apprentissage de la culture française à l'université algérienne ?

33 réponses



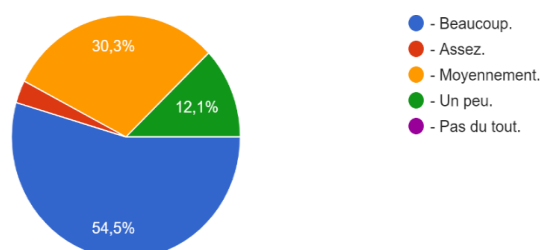
**Figure 4 : Results of the fourth question of the final questionnaire**

a) For the fourth question, all 33 students (100%) provided answers. The results reflect a strong openness toward learning about French culture within the Algerian university context. Notably, 29 out of 33 students (88%) were "For" learning about French culture. Only 4 students (12%) responded with "Against."

### Q.05- Could learning French culture help you in your learning of the French language?

Q.05- L'apprentissage de la culture française pourrait-il vous aider dans votre apprentissage de la langue française ?

33 réponses



**Figure 5 : Results of the fifth question of the final questionnaire**

The final question received responses from all 33 students (100%). The results reveal that over half of the participants recognized the value of learning French culture for improving their language skills. Specifically, 21 out of 33 students (58%) responded with "A lot" or "Enough." The remaining 15 students (42%) chose "Moderately" or "A little."

## 6. Discussion

The findings of this study underscore the transformative potential of the flipped classroom model as an innovative teaching approach. By prioritizing active student engagement and leveraging technology, the model fosters deeper understanding, critical reflection, and inquiry. This study's results, gathered from the final feedback questionnaire, align with the broader benefits highlighted in existing literature and reinforce the model's efficacy in diverse educational contexts.

A significant majority of students reported that the teaching-learning method effectively facilitated cultural and intercultural knowledge development, with 78% acknowledging frequent improvements. This aligns with Fuchs (2021), who emphasized the importance of active and participatory learning environments in promoting deeper engagement. Furthermore, 64% of students found the method effective in enhancing familiarity with French culture, a finding consistent with Tunggyshbay et al. (2023) and Haralanova & Fafner (2023), who highlighted the flipped classroom's success in specialized fields through multimedia resources and structured pre-class activities.

The recognition of substantial cultural differences between Algerian and French contexts by 72% of participants further demonstrates the model's capacity to foster analytical skills and cross-cultural awareness. This is supported by Cevikbas and Argün (2017), who asserted that the integration of information and communication technologies in flipped classrooms equips students with critical digital competencies.

Moreover, the openness and curiosity fostered by the model were evident, with 88% of students expressing a positive attitude toward learning about French culture. This complements the findings of the "Analysis of the Flipped Classroom Model as a Proposal for Teaching Innovation" (2022), which highlighted the model's ability to address evolving educational needs by encouraging autonomy and

meaningful interactions. Additionally, the reported improvement in language skills by over half of the participants aligns with the assertion that integrating cultural learning can enhance linguistic proficiency, as noted by Cevikbas and Argün (2017).

Despite its advantages, the flipped classroom model is not without challenges. Concerns about increased student workload and initial participation barriers, as noted by Fuchs (2021), underscore the need for clear guidelines, structured activities, and continuous feedback. Proper planning and support are essential to mitigate these challenges and ensure the model's success.

## **7. Conclusion**

In conclusion, this study reaffirms the flipped classroom model as a promising pedagogical approach that bridges traditional and modern teaching methods. By addressing academic and cultural dimensions, it equips students with the critical skills needed to thrive in a globalized world. Continued research and refinement will further enhance its adaptability and effectiveness across diverse educational contexts.

In the face-to-face component of this study, we introduced topics designed to engage students and challenge their preconceived notions about France, the French education system, the French language, and French culture. Each session began with a discussion of these topics, enabling us to measure students' progress in developing (inter)cultural competence. These discussions also provided an opportunity to correct misconceptions and address resistance, helping to prevent any barriers during the teaching-learning process.

We emphasized the importance of understanding the culture of the target language without directly imitating its practices. The objective was to encourage respect for cultural differences and openness to other cultures, rather than viewing them as obstacles to language learning. This approach fostered an inclusive mindset, promoting appreciation for diversity.

However, the study faced several limitations. Some students lacked the resources to complete the remote tasks, which hindered their ability to fully participate in the experiment. Additionally, some students resisted the pedagogical changes introduced by the flipped classroom model and chose not to participate. As a result, the number of participants was reduced to thirty-three.

Despite these challenges, the results of our experiment confirm our initial hypothesis. However, the most significant challenge in teaching and learning (inter)cultural competence lies in evaluating its development among students. Identifying reliable and appropriate assessment criteria remains a complex issue.

We recommend further research to explore effective methods for evaluating the implicit teaching and learning of (inter)cultural competence. Future studies should aim to propose new strategies and practical approaches to provide deeper insights into this important aspect of education.

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# Strategies for Using Didactics to Improve Integration Situations in the Educational System

**Belaidouni LAKHDAR**

PhD, University of Oran2, (Algeria)

Email: Lakhdar-79@outlook.fr

**Abstract:** *The main contemporary issue in the field of education centers on the tension between political agendas and strategic innovation. This conflict often arises due to resistance to change, skepticism towards new disruptive approaches, and a lack of familiarity with modern technologies. The current educational focus emphasizes achieving excellence through the integration of technology, alongside adapting to the diverse learning needs of students. Additionally, there is an increasing concern with addressing dropout rates and enhancing academic performance. To resolve this, it is crucial to foster constructive and open dialogue among all stakeholders, including administrators, to navigate these challenges and ensure a more effective and inclusive educational environment.*

**Keywords:** *didactics; educational system; software integration; academic success; study programs.*

## 1. Introduction

Education is a well-established profession central to the acquisition of knowledge, requiring high levels of skill and expertise from teachers and instructors. Excellence in this field represents a blend of art and science. Educational institutions—at all levels, from primary to tertiary education, as well as those focused on scientific training and vocational preparation—hold significant responsibility for disseminating knowledge and preparing individuals with skills aligned to their academic and professional qualifications (Harizi, 2010: 40).

Moreover, the practical field serves as an essential space for applying acquired knowledge, allowing raw concepts to be reshaped and utilized effectively. This approach places learners in practical situations that assess their comprehension of knowledge and their ability to apply it across varied contexts. Yet, the role of the educational specialist extends beyond this evaluative stage, addressing critical questions about the quality and relevance of educational programs to learners' needs. Additionally, if integrative practices lack alignment with educational didactic standards, they lose their effectiveness. Didactics, as derived from empirical studies, aims to identify gaps and mitigate negative outcomes observed particularly in scientific teaching. It serves as a framework that connects the educational environment with cognitive content and enhances teaching effectiveness. Through didactics, shortcomings in the educational process are identified, emphasizing the development of curricula and enhancing teachers' abilities in educational interactions. Furthermore, educational tools, resources, and competencies play a vital role in advancing educational quality and boosting students' academic achievement. Beyond a focus on competencies or objectives, education also requires integrative approaches that support understanding and comprehension, rooted in studies related to the local environment rather than solely depending on models imported from Western countries, which can sometimes exacerbate dropout rates.

The absence of an effective educational system has been associated with a steady decline in educational standards, highlighting the need for strategies that align with contemporary knowledge advancements and elevate educational quality across various sectors and levels.

Finally, the question of using didactics to enhance integrative practices in the educational system has garnered substantial research interest in educational sciences.

Prior studies, including the work by Moliner, Lozano, Aguado, and Ameyama (2024) titled *“Building Inclusive and Democratic Schools in Spain: Strategies for Mobilizing Knowledge about Inclusive Education through Participatory Action Research”*, De Benito, Lizana, and Salinas (2024) on *“Using Concept Maps to Develop Faculty Members in the Context of Pedagogical Weakness”*, and Romichowski (2024) in *“Producing Educational Systems: Planning Lessons for Individual and Group Educational Activities,”* have contributed important insights. Additionally, Vollmer and Kletty’s (2023) study titled *“Knowledge of Educational Content and Thematic Didactics – A Continental Dialogue?”* further addresses these themes.

These studies prompt several questions regarding the strategies for applying didactics to foster inclusive educational environments: Do educational programs provide learners with cognitive tools that enhance understanding and acquisition? On what foundational principles were these programs developed? Have they been subjected to rigorous assessment, including consideration of individual learner differences? Finally, do the educational conditions facilitate learners’ effective use of these resources, assuming the validity and effectiveness of the knowledge conveyed?

## **2. The Concept of Didactics and Its Types**

### **2.1 The Concept of Didactics:**

Didactics, or the science of teaching, refers to the systematic study of teaching methods and techniques, as well as the various ways in which learning experiences are structured within educational institutions. As a field, didactics is both scientific and practical, dedicated to developing and testing pedagogical strategies that facilitate the implementation of educational projects. It involves applying structured pedagogical knowledge in classroom settings with the aim of subjecting the teaching and learning process to rigorous standards, thereby reducing improvisation and randomness. (Vollmer, 2024: 87)

Didactics has also been shaped by various theoretical models, including those proposed by Alvin Toffler, who discussed the demands of educational curricula within the “third wave” society—a post-industrial era. Toffler emphasized the need for educational systems to teach these curricula by refining how information is classified, reclassified, assessed, and adapted when necessary. His ideas underscore the importance of examining problems from new perspectives and fostering the learner’s ability to self-direct their education, ultimately equipping them to solve complex problems independently. (Elecalde, García, Martos, & Arnáez, 2024: 211)

Moreover, didactics can be understood as the art of teaching, encompassing a variety of techniques and approaches that guide the acquisition and use of knowledge in specific subject areas, languages, or arts. It can thus be viewed as the effective application of strategies that enhance the educational process and encourage meaningful interactions between teacher and learner. This is achieved through a clear and structured educational approach, such as the integrative situation methodology, which strengthens understanding and facilitates knowledge acquisition by engaging learners in simplified, coherent learning experiences.

**2.2. Foundations of Didactic Science:** The didactic process involves the systematic application of teaching methods, techniques, and the organization of learning experiences within educational settings. This process aims to develop students’ knowledge, skills, abilities, attitudes, and values, with the ultimate goal of meeting established learning outcomes. To this end, analyzing the educational process is paramount, achieved through the development of applied models and theories that yield

insights beneficial for teachers, educational supervisors, and other stakeholders. Such frameworks facilitate the understanding of challenges and the implementation of solutions, enhancing educators' ability to perform their teaching roles effectively. (Ligozat & Buyck, 2024: 14)

The foundational aspects of didactics are represented through several core principles, including:

- **Defining Learning Objectives:** Setting clear educational objectives is a fundamental step in the teaching process. Clear goals direct the teacher's efforts and help students understand the expectations for their learning. Objectives encompass cognitive, emotional, and psychomotor domains, fostering a well-rounded comprehension of the content.
- **Developing Conceptual Frameworks:** This involves organizing educational content so that it aligns with available resources and school curricula. Teachers must present information in a structured way that clarifies relationships among concepts, thereby supporting effective learning and deeper understanding.
- **Understanding Learners' Backgrounds:** Familiarity with learners' prior educational experiences, as well as their psychological and social contexts, is essential to didactic practice. This awareness allows teachers to tailor their teaching approaches to meet individual learning needs, thereby fostering classroom engagement and interaction.
- **Applying the Didactic Triangle:** The didactic triangle, comprising knowledge, teacher, and learner, encapsulates the interactions central to the learning process. This model highlights the distinct roles each component plays and the synergy required to create an integrated learning experience.
- **Utilizing Effective Teaching Strategies:** Teachers employ a range of pedagogical strategies, including technological tools, visual aids, and multimedia resources, to enhance comprehension and facilitate skill development. Such methods contribute to a dynamic learning environment that supports knowledge acquisition.
- **Addressing Individual Differences:** recognizing the diverse mental, physical, and emotional characteristics of students is crucial. By understanding these variations, teachers can create adaptable learning experiences that allow all students to participate actively and learn effectively.

### 3. Types of Didactics and Their Tributaries

#### 3.1 Types of Didactics:

In the study of didactics, it is essential to differentiate between two primary types:

- **General Didactics:** General Didactics addresses the universal aspects of teaching across all subjects, focusing on the overarching principles, rules, and foundations that apply regardless of specific subject matter. Its purpose is to implement these principles across various educational fields. General didactics itself can be divided into two areas:
  - The first area focuses on the educational context, providing fundamental guidelines for planning instructional strategies and methods for all students.
  - The second area examines the general laws of teaching that apply universally, without being tied to the specifics of any particular subject.
- **Special Didactics (or Subject Didactics):** Special didactics is concerned with teaching particular subjects and involves methods and strategies tailored to each field. For example, the didactics of mathematics encompasses the teaching and learning of arithmetic, geometry, algebra, and probability, focusing on approaches

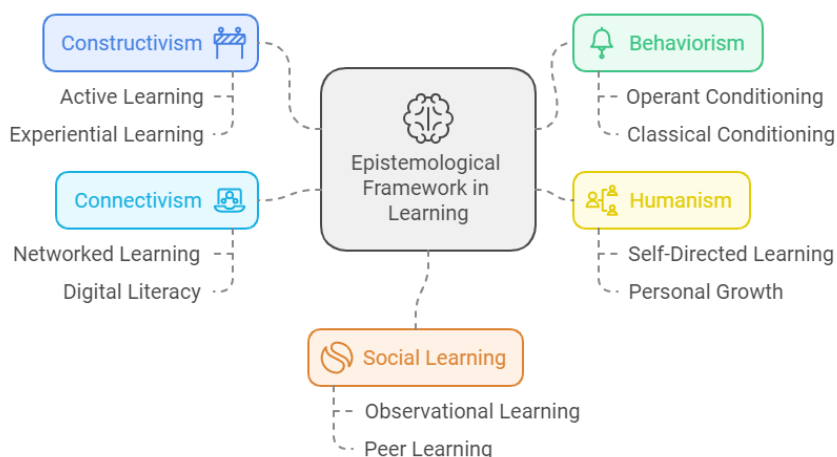
specific to these mathematical areas. (Gëbal & Miodunka, 2024: 20)

### 3.2 Didactics Tributaries:

#### 3.2.1. The Epistemological Tributary: Learning involves two main dimensions:

- The first dimension is an active process driven by the learner's capabilities and readiness to engage with a given subject matter.
- The second dimension is the structured and organized educational content that forms the subject matter of learning.

Learning occurs through a structured interaction between the learner and the content, within a specific context, and often guided by a mediator (such as a teacher). The epistemological tributary thus draws upon a body of knowledge that enables teachers to deliver specialized content through effective methodologies and communication channels. For instance, an integrative approach that outlines core themes and content organization can help simplify complex material, enhance understanding, and support academic achievement, while also considering individual learner differences. (Johansson & Andersson, 2024: 76)



**Figure no 1 – The Epistemological Tributary**

The epistemological aspect of didactics identifies gaps and errors in subject fields, utilizing scientific methods—such as measurement, statistical analysis, experimentation, and advanced technological tools—to achieve insights that aid in designing cohesive, integrative learning experiences. This approach supports a structured understanding of content and fosters academic achievement by enhancing clarity and comprehension. (Sundar et al., 2024: 17)

**3.2.2. The Psychological Tributary:** Cognitive psychology, a key psychological tributary, focuses on understanding individual behavior by studying mental and intellectual abilities—specifically how individuals think, learn, and remember. This field encompasses the study of perception, motivation, emotion, language, learning, memory, attention, decision-making, and problem-solving, while recognizing individual differences in intelligence, learning styles, cognitive processing, retrieval, and emotional responses. In education, cognitive psychology is fundamental to understanding how learning occurs,

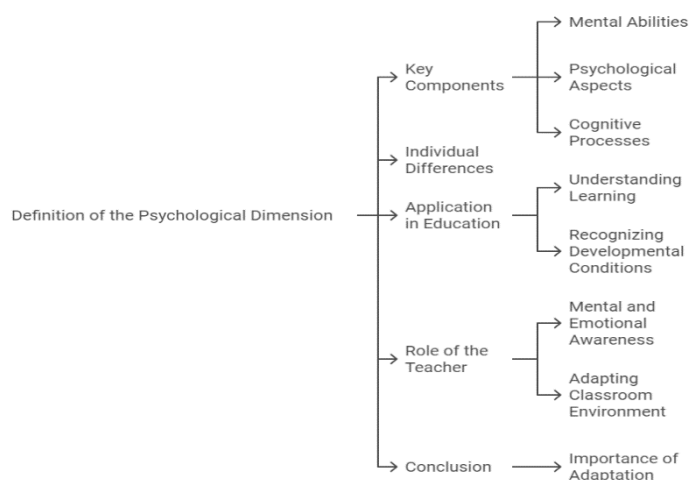
supporting teachers in creating effective learning environments that cater to diverse student needs. (Al-Drij 2011: 7)

The psychological tributary in education underscores:

- **Understanding How Learning Occurs:** This involves identifying how individuals acquire knowledge, skills, competencies, attitudes, and learning strategies, thus helping educators to tailor teaching approaches that foster deep, lasting learning.

- **Recognizing Developmental Influences on Learning:** Effective teaching requires analyzing developmental conditions that impact the learning process, drawing insights from learning theories (often rooted in the psychology of learning) to understand and guide the educational journey. (Dibon 2018, p22)

This tributary also highlights the importance of teachers' awareness of their teaching environment and their capacity to recognize the psychological and mental variations among students. This includes sensitivity to differences in students' cognitive, intellectual, sensory, and physical characteristics. Such awareness enables teachers to adapt their instructional methods to align with individual learning capacities and competencies, ensuring that the delivery of content is responsive to each student's unique needs. By doing so, teachers foster an inclusive and effective learning experience that supports optimal knowledge acquisition and development for all students.

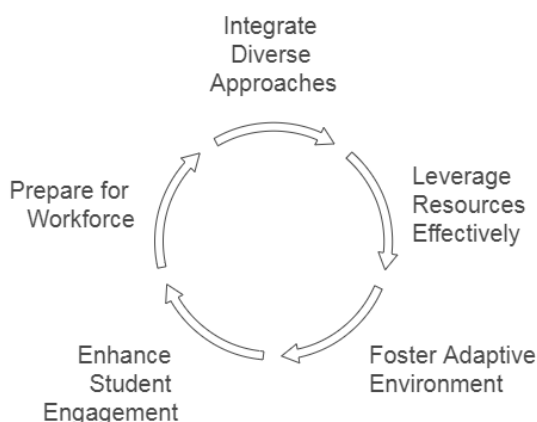


**Figure no 2 – The Psychological Tributary**

**3.2.3. The educational tributary:** The educational tributary encompasses a range of elements and factors aimed at enhancing and advancing the educational process. This tributary includes teaching methods, learning resources, and the overall educational environment, along with the role of modern technology in introducing innovative tools and approaches that facilitate learning and foster student engagement with educational content. (Al-Drij 2019: 1)

In the context of 21st-century challenges, the educational tributary serves as a vital component in addressing the evolving needs of education. It plays a key role in improving education quality and equipping students with the skills required in the modern workforce. By integrating diverse instructional approaches, leveraging resources effectively, and fostering an adaptive learning environment, the educational tributary

supports an educational system that not only enhances students' academic experience but also prepares them to meet the demands of an increasingly complex and dynamic labor market.



*Figure no 3 – The educational tributary*

#### **4. The Integration Situation: Components and Mechanisms of Application in the Didactic Process:**

The integration situation is a complex scenario designed to engage students in applying previously acquired knowledge and skills in a structured and meaningful way. Unlike isolated exercises, this situation encourages students to consolidate their fragmented learning, putting it into a practical order and within a new context. It mirrors real-life or professional settings, guiding students to develop competencies relevant to their field. This integration process generally follows the completion of standard learning activities within an educational unit and serves as a practical demonstration of the skills or knowledge the student is expected to master. (Al-Mubashari 2002: 88)

**4.1. Components of the Integration Situation:** The integration situation is structured around three key components:

- **Document:** the document acts as a primary resource containing texts, images, tables, or graphs that students use to gather the information necessary to address the situation. It serves as a reference and comprises three elements:

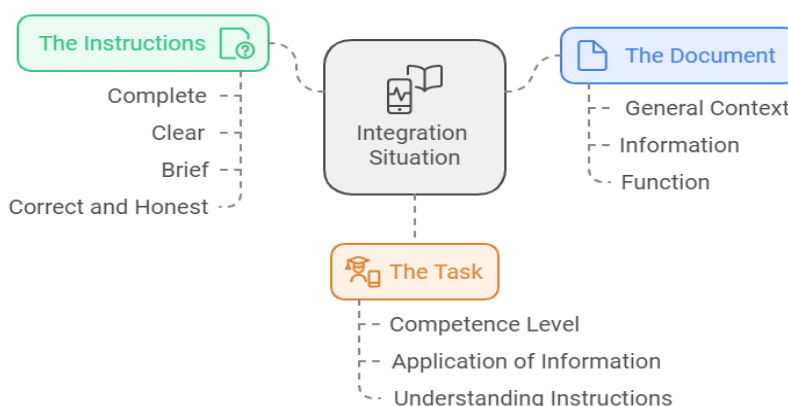
**General Context:** The context is relatable to the learner's life, interests, or familiar circumstances, grounding the situation in real-world relevance.

**Information:** This includes integrated, relevant data that supports the learner's activity, fostering both understanding and competitiveness.

**Function:** The document provides a specific goal or purpose for the task, helping the learner focus on achieving the desired outcome. (Al-Drij 2003: 72)

- **Instruction:** Instructions guide the student's approach to the task by posing questions or prompts that are clear, concise, and directive (e.g., "choose," "suggest," "conclude"). Instructions should engage the learner in deeper cognitive processes, such as analysis, synthesis, and evaluation, rather than simple

application. (Al-Drij, 2022)



**Figure no 4 – Components of the Integration Situation**

#### **Characteristics of Effective Instruction:**

**Complete:** The instruction should be a fully formed directive so that the learner understands what is required.

**Clear:** Avoids ambiguity by using straightforward, actionable verbs.

**Brief:** Short instructions help maintain student focus and prevent disengagement.

**True and Correct:** Instructions should reflect real-world scenarios. They should be independent, allowing the learner to skip one and continue with another if necessary.

- **Task:** The task is the learner's response to the instruction. It represents what the students are expected to accomplish, showcasing their abilities. A task may include several instructions or serve as a final product demonstrating the learner's proficiency. This response is where students exhibit their competencies, bringing together the learning objectives and their application within the situation. (Rafika 2018: 101)

#### **4.2. Mechanisms for Implementing Didactics in Teaching Material through the Integrative Situation:**

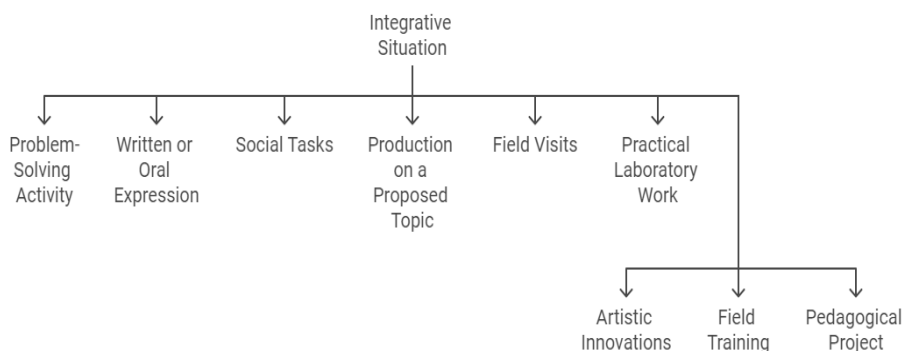
The didactic triangle is foundational in the educational process, linking the teacher, learner, and knowledge. It emphasizes the qualitative interaction between these three elements within a particular educational setting and time. To effectively employ didactics, educators need to understand each party involved: the learner's abilities and environment (drawing on developmental and social psychology), the knowledge (ensuring concepts are introduced progressively), and the teacher's role (requiring skills in planning and applying learning theories). (Saidi et al. 2021: 66)

The integrative situation provides a structured methodology for utilizing didactic principles to enhance teaching practices. It prioritizes clarity, simplicity, and accessibility to raise educational standards across levels. An effective integrative situation helps students understand, retain, and apply knowledge across disciplines by using a variety of activities. This cognitive integration is achieved through specific components:

#### 4.3. Components of the Integrative Situation:

- ✓ **Problem-Solving Activity:** Problem-solving is fundamental to the integration situation. This activity involves:
- ✓ **Defining the Problem:** Identifying a challenge that obstructs the achievement of a need or goal.
- ✓ **Solution Steps:** This includes understanding the nature of the problem, generating a solution by connecting given information with unknowns, and implementing the solution while observing the outcome.
- ✓ **Written or Oral Expression:** Language-focused integrative activities encourage expressive skills, such as:
  - Describing a person or animal.
  - Completing a video script.
  - Writing a story or an invitation, this fosters communication and literacy skills.
- ✓ **Social Tasks:** Activities of a social nature aim to engage students in societal issues:
  - Examples include writing an article to raise awareness, planning a project to decorate the school, or investigating environmental cleanliness issues.
- ✓ **Production on a Proposed Topic:** This task involves creating a complex piece of work based on existing knowledge, often requiring additional research to deepen understanding of the topic.
- ✓ **Field Visits:** Real-world engagement through field visits allows learners to confront practical problems, either as participants or observers, connecting classroom learning to real-life applications.
- ✓ **Practical Work in the Laboratory:** Laboratory work applies the scientific method, encouraging students to formulate hypotheses, conduct experiments, and analyze results.
- ✓ **Artistic Innovations:** These activities, such as writing poetry or drawing, encourage creativity and the expression of personal ideas in literary or artistic forms.
- ✓ **Field Training:** Field training links theoretical knowledge to practical application, providing hands-on experience that enhances learning through real-world practice.
- ✓ **Pedagogical Project (Class Project):** A pedagogical project involves students actively using their knowledge to achieve specific goals. Each student contributes, applying their unique skills and understanding in a collaborative setting to reach a shared objective.





**Figure no. 5 – Components of the Integrative Situation**

## 5. Digitization and Its Role in Enhancing the Didactic Educational Process

Digitization has become a crucial element of modern education, enriching teaching and learning by integrating digital resources across various educational aspects. These resources can significantly impact three core areas in the didactic process:

**5.1 Lesson Development:** Digital resources allow for lesson development within a structured pedagogical framework that incorporates what are known as "pedagogical pieces." These strategies enable educators to adapt content to various didactic situations, fostering an interactive and engaging experience tailored to students' needs. Digital tools such as videos, animations, and interactive simulations bring lessons to life, enhancing engagement and making learning more dynamic and adaptable. (Ait Ouchan, 2005: xx)

**5.2 Pedagogical Assessment:** In educational assessment, digital resources enhance both diagnostic and formative evaluation. By using digital tools, teachers can identify students' strengths and weaknesses with greater precision and track their progress in academic and personal skills. These tools also make assessment more comprehensive, allowing for individual and group evaluations that offer accurate feedback and support continued growth.

**5.3 Pedagogical Support:** Digital resources are valuable for supporting students with learning difficulties, offering individualized and group-based assistance. These tools help address knowledge gaps and enable self-paced learning both inside and outside the classroom, thereby boosting understanding and supporting ongoing improvement in students' learning journeys.

Integrating digital media within education offers a flexible, responsive, and inclusive learning environment that meets diverse student needs, promotes independent learning, and adapts to evolving educational demands. (Mazhoudi, 2018: 144)

## 6. Additional Strategies to Improve the Digital Didactic Process

To maximize the effectiveness of digital integration in education, the following strategies can be applied:

- **Clarity and Simplification in Explanation:** Presenting information clearly and simply is key to enhancing students' understanding of concepts. Simplified explanations allow for greater engagement and deeper comprehension of subject material.

- **Using Traditional Educational Tools:** Despite advances in digital resources, traditional tools such as boards, charts, and printed images remain valuable. Used alongside digital tools, they create a hybrid approach that reinforces understanding and supports varied learning preferences. (Junayer & Van der Borch 2011: 78)
- **Emphasis on Core Content:** Focusing on fundamental concepts that students may find challenging supports comprehensive learning and strengthens their ability to apply this knowledge in practical scenarios.
- **Reinforcing Fundamental Principles:** By establishing a solid foundation through core principles, students develop a cognitive framework that facilitates understanding of advanced topics and concepts. (Al-Drij ,2022)
- **Taking into Account Individual Differences:** Adapting to individual learning needs promotes inclusivity and supports diverse learning abilities, creating an adaptable and supportive educational environment.
- **Reviewing and Modifying Curricula:** As societies evolve; educational curricula must be revisited periodically to reflect technological and societal shifts. This ensures education remains relevant to community needs and advances sustainable development.

## 7. Conclusions

Didactics plays a vital role in the educational system by enabling all stakeholders—teachers, students, school administrators, and guidance counselors—to analyze and address challenges in teaching and learning. This process serves as the foundation for developing effective educational strategies that enhance the quality of education and resolve issues related to various subjects.

To achieve optimal educational outcomes, it is essential to create integrated educational plans that include comprehensive resources for each subject. These plans should prioritize the setting of clear and measurable educational objectives, which can be broken down into two main areas:

- **Psychological Aspects:** This axis focuses on the psychological dimensions of both the teacher and the learner. It stresses the importance of recognizing individual differences among students, which is crucial for effective classroom management and personalized instruction. Teachers and guidance counselors must be equipped to understand these differences, fostering an inclusive learning environment. Additionally, a teacher's ability to engage with and present educational material effectively is key to the success of the educational process.
- **The Role of the Teacher:** The second axis highlights the teacher's role in the educational process, encompassing their competence, teaching methods, and pedagogical approach. Emphasis should be placed on the adoption of modern educational methodologies, including the use of visual aids (such as images and charts), digital technologies (such as computers and educational videos), and other technological tools that simplify content delivery and improve student performance.

By combining psychological understanding with innovative teaching methodologies, the effectiveness of teaching and learning can be significantly enhanced. This integrated approach leads to improved academic performance, better engagement with the content, and a more responsive education system that meets the diverse needs of students, preparing them for success in the modern world.

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# Design of a Forum Theater Script on the Issue of Drug Use

**Andreea Valeria ANDRAȘ (CRIȘAN)**

PhD Student, West University of Timișoara (Romania)

Email: andreea.crisan76@e-uvv.ro

**Abstract:** *Forum theatre is an interactive form of theatre, often used as a powerful tool to address important social issues. In this type of performance, drug use is explored from multiple perspectives, highlighting the consequences and dilemmas faced by young people affected by this issue. In this article, I propose a model of intervention through forum theatre to prevent and combat drug use among adolescents. This includes a detailed description of how to design a forum theatre workshop for adolescents and young people, aimed at a group of 30 participants. The goal of this type of performance is to encourage the audience to critically analyze the impact of drug use on both individual and collective life, while also providing an opportunity for them to interact with the story and influence its course. Through forum theatre, the audience can stop and modify the characters' actions, exploring alternatives and solutions to drug-related problems. This technique fosters dialogue and active involvement, transforming the audience from mere spectators into active participants. This paper examines the construction of such a performance and its applicability for groups of up to 30 young participants, as a method for preventing and combating the consumption of illicit substances. The script will address the dilemmas and conflicts faced by affected individuals, as well as how to document the social issue and the characters involved. This approach aims not only to educate but also to stimulate a constructive dialogue that reduces stigma and promotes positive changes within the community.*

**Keywords:** *social theatre; drug use; forum theatre; non-formal methods; education.*

## 1. The Problem of Drug Use

Drug use is an increasingly prevalent issue in modern society, and both small and large communities are seeking solutions to effectively combat and prevent this problem. Vulnerable groups that are at a higher risk of drug use include adolescents and young adults, individuals with mental health disorders, homeless people, those from disadvantaged backgrounds, and those with a history of abuse or neglect, as well as individuals with a family history of drug addiction (World Health Organization, n.d.).

Adolescents, who represent the highest percentage of drug users—about 50% of users based on age criteria—form a category that undergoes significant changes. This age group is prone to risky behavior and excess, but it is also one of the most influential and nonconformist demographics. Statistics indicate that adolescents are particularly predisposed to drug use (Crețu, 2003).

Drug use among adolescents is a critical issue in both Romanian and international society, with serious consequences for individuals and communities. Alongside violence, drug use is the second most significant problem faced by communities (Crețu, 2003). Young people are among the most vulnerable to this danger, and most prevention programs focus on this age group. Drug consumption is influenced by a range of factors, including socio-economic, biological, psychological, and environmental influences (Rășcanu, 2004).

The repercussions of drug use are devastating not only at the individual and family levels but also on a societal scale (Șchiopu, 2008). These effects can range from isolation, depression, and withdrawal states that are difficult to manage, to aggression, suicide, or violent acts within the group and society. Drug users are a vulnerable group in need of effective solutions (Popescu et al., 2004). Buzducea (2005) proposed a series of

indicators related to drug use, including: discomfort, mental and behavioral instability, eye irritation, paranoid thoughts, unreasonable and inappropriate aggression, depression, apathy, poor academic performance, decreased motivation, restlessness, absurdity, and interpersonal relationship problems.

Key Changes: Among the external causes of drug use in young people, Gilles Ferréol also mentioned: circle of friends, low level of education, lack of information about drugs (Ferréol, 2000).

In Romania, the National Anti-Drug Agency's National Report on the Drug Situation for 2022 is that 10.7% of those aged 15-64 have consumed at least one type of illicit drug throughout their lives (experimental consumption), while 6% of them have also consumed it in the last year (recent consumption). There is a slowdown in the rate of increase in consumption for most illicit drugs, except for the use of new psychoactive substances (NPS). The highest consumption rates are observed among the young population (15-34 years old). Adolescence is the period with the greatest vulnerability to the initiation of drug use, the lowest age of onset being declared for the consumption of new psychoactive substances (13 years).

The most consumed drug in Romania is cannabis. This drug ranks second in the general population, after the use of psychoactive substances, and number one among adolescents who go to school. In the case of 16-year-old students, 8.7% of them have used cannabis at least once in their lives, 7.2% have used it in the last year, and 3.3% of them have also used it in the last month (Agenția Națională Antidrog 2022).

Following the analysis of statistics, drug use among adolescents is certainly a social problem that has all the premises to be analyzed and staged in the Forum Theatre. This is why I will describe how to prepare such a show from the perspective of amateur actors, in a workshop on the construction of a forum theater script.

## **2. Social Theater or Forum**

Social theater is perhaps the most impactful of the genres because it engages the audience not only emotionally but also cognitively or physically and has the specificity of being natural, related to the problems of society, dedicated especially to amateur or non-actor actors (Boal, 2013).

This is the reason why an actor in such a show must be well documented and trained to cope with the baggage of knowledge that comes with the spectator who will also enter the show (Stanislavski, 1955).

I chose the forum theatre, or the theatre of the oppressed, proposed by Augusto Boal in the 70s as a method of social intervention in societal problems (Boal, 2013). The characters involved in this kind of theater are well delimited and this is the reason why it can be applied to certain social issues more effectively than other non-formal methods such as debates, conversations, links or the living library.

"Social theatre is a repetition of reality", said Augusto Boal. Boal described the theatre of the oppressed as a tree that has images, sounds and words at its roots. In his opinion, "theater is a form of knowledge; it must and can be a means of transforming society. Theatre can help us build our future, not just wait for it. Essentially, this method uses theater to generate solutions to real problems; it creates dialogue where there is only monologue and, ultimately, humanizes humanity (Boal, 2013).

The social theater aims to present the vision of young people regarding problems related to their health and rights, prevention of risk behaviors, prevention of discrimination, combating drug use. The actors, who are pupils and students, try through plays to involve the audience in finding solutions to the social problems addressed (Crețu, 2003).

In the forum theater workshop, the social problem will be staged, and we work collaboratively in groups, and each group will necessarily consist of 5 typologies with a fixed structure.

The typologies are as follows: the oppressed (the victim), the oppressor (the aggressor), the observer (a witness who fails to change the situation), the ally (the one who usually supports the victim) and the joker (the one who mediates the situation, invites the audience to solutions and stops the show when necessary).

Augusto Boal calls those involved in social theater performances non-actors, because they have not attended a faculty of dramatic art. However, in order to crown the initiative successfully and to interact with the public, they need preparation. Non-actors resort to improvisation every time. The preparation of such a show, however, is very well documented, as we will see in the design of the workshop for the construction of a forum theater script on the drug problem (Schutzman, 2002).

Forum theatre "has two fundamental principles: firstly, to transform the spectator from a passive one into an active one, involved in the dramatic action, who creates and transforms; secondly, not to be content with just reflecting on the past, but to prepare for the future".

Non-actors, as we will call them, have the opportunity to be actively involved in the development of the play, creating the change they want in a certain situation (Boal, 2013). The purpose of the forum theater is to encourage the audience to take a stand towards a situation of oppression by intervening in the development of the play, so it is very important how the problem is exposed, and the mediation of the joker with the audience (Boal, 2013).

The first part is the performance of the play itself according to a scenario in which a situation of oppression is described, and this part we will deal with in the following lines, and in the second part the play is resumed, but giving the audience the opportunity to turn into a spectator/actor through interventions in the play.

In the second part, the better the non-actors present the situation of oppression, the sooner the audience intervenes and sanctions the intervention.

If the audience does not intervene, the scene will be repeated until someone from the audience has the initiative and comes on stage. It is good to know that neither the oppressed nor the oppressor can be replaced by the public, which makes their roles all the more difficult (Boal, 2013).

We will explain only the first part of the preparation of the show, which is very important for the knowledge of a social problem in its depth. In the description of the workshop we will deal with the most thorough preparation of the characters and the script to be presented to the audience, as an exercise. The participants are 30 young teenagers and there will also be spectators for each group of colleagues who present a script.

The two central typologists in the play are the oppressed person for whom the conflict ends badly and the oppressor who makes the protagonist's life difficult. In addition to these characters, which we will analyze strictly on the social issue, there are 2 other characters, the ally and the observer, who are replaced by people from the audience and who, having the necessary information, could change the situation, but still, they do not succeed (Boal 2013).

The interaction with the audience is led by a character called the Joker. The Joker directs the play like a director and establishes the connection between the stage and the audience. He is a mediator, who should also take care that certain ethical rules are respected. At first, Joker welcomes the audience, then he can do some short warm-up exercises with the audience and names the title and social issue of the play forum.

The characters studied in the workshop are: 1. The Oppressed (Victim) – the person who is most affected by the social problem under discussion; 2. Aggressor (Oppressor) – the person who manifests physical or moral aggression towards the victim. He is the only character who cannot be replaced; the audience confronts him and tries to change his attitude; 3. Ally – the person who supports the victim, but does not have enough power to confront the aggressors; 4. The observer – the person who sees the oppression/social problem, but decides not to intervene in the resolution of the conflict; 5. The Joker – a key character, leads the performance, is the connecting channel between non-actors and spectators. The Joker asks questions and urges the audience to analyze the proposed solutions. The joker never gives answers, he is the mediator, the one who intervenes with solutions, invites colleagues to dialogue, is the director of the moment and must know the whole subject and be able to intervene where needed (Schutzman, 2002). If in some cases the joker is played by the coordinating teacher, then in the role of ally there will be two characters, (a parent and a friend).

In the scene elaborated by the group (the so-called model scene) the individual roles must come out clearly. Not only by the text of the people, but also by their behavior. At the end, the audience is asked to present the conclusions and lessons they have drawn from the theater session, thus highlighting the impact that the show had.

### **3. Presentation of the Working Method and Characters in the Forum Theatre**

I will present the working method of preparing a forum theater performance with the students, and I will report the working method and the information provided for this category of amateur actors. The information is always chosen according to the participants' ability to understand so this time the information will be like for the university school (Șchiopu, 2008). As a theater teacher for young people and adolescents, I always choose non-formal methods of accessing information related to the study of people, and this time the information was through a documentary film and links about consumption. (Dortier, 2007)

Various case studies and projects have repeatedly shown that participatory dramatic research with Forum Theatre can stimulate processes of change at the individual, social, social and political levels (Boal, 2013). The difference between social theater and theater based on dramaturgy is the way of creation. In the case of traditional theater, the play is created by a playwright, staged by a director and performed by actors. In social theatre, actors are both playwrights and directors, because they create the play.

Traditionally, a social theater play can be created for a few hours and does not require complicated stage preparations. Anyone can initiate the creation of a social theater team, but it is important to note that this group will experience the role of amateur actor in forum theater, and in this way will approach the subject through role-playing (Stanislavski, 1955).

In order to work in a 3-hour workshop, the group of 30 will be divided into 6 groups of 5, and the construction of the roles will be done by each group according to a predetermined scenario. In each group of amateur actors, in our case students, or members of the community, the role of each one will be established by drawing lots, thus stimulating curiosity and satisfying the adolescent's need for play and challenge (Dincă, 2004).

The participants in the forum theater on the subject of drug use, each of them needs data and information to build the answers and to outline the subject, the conflict and the solution. For the application of an intervention of this kind of social theater, more information is needed for the application of the method, so we will study each typology



separately in the problem we have chosen in the debate.

In order to assess the impact of the forum theatre, the working group will be consulted through a short brain storming (conversational workshop), about the information it has about consumption but also about the subject and the people involved. The same process will be carried out at the beginning and at the end of the workshop, with the same questions, to assess the impact of this type of intervention.

After establishing the problem that we are going to discuss, here drug use, the stages of work are divided into as follows:

- A. **Conversation about drug use**
- B. **Presentation of an informative material on the subject, which will be made available by the teacher for a more correct documentation**
- C. **Construction of the script and roles**
- D. **Preparation with improvisation exercises, acting and interpretation of the forum play and Conclusions in a final conversation**

#### **A. Conversation about drug use**

In the initial conversation, the group will communicate the information related to the subject of drug use based on a set of questions and will write down ideas and suggestive words, after which they will be analyzed and discussed together with the group. The brainstorming will be related to what is known about drug use and will be noted at the beginning and at the end in different tables and compared as answers. An interview guide completed at the beginning and at the end of the workshop is very important to clarify the effectiveness of this type of intervention.

The questions are of the type: What are drugs?; What are the environments prone to consumption?; How do we prevent consumption?; What do you do if your friend needs help because of consumption?; What do you do if you become a consumer?; What do you do if you are a parent?; How would you react if you were offered to consume or traffic?; Do you think it's easy to get rid of this vice?; What are the dangers to which a consumer is exposed? In the next stage, the group of 30 students will participate for 3 hours in the workshop on drug use, they will be divided into groups of 5, representing the typologies: oppressed, oppressor, ally/parent, observer, joker, as it is done in Augusto Boal's forum theater (Boal, 2013).

#### **B. Presentation of an informative material on the subject, which will be made available by the teacher for a more accurate documentation**

I will exemplify the kind of information that the workshop participants must have, who will all have a role from the 5 typologies and that the coordinating teacher will have to make available to the participants through a documentary, link or informative material. All research and statistics will be presented synthesized through a non-formal method or a material that can be studied for information will be made available to the group.

For the problem of drug use, it is important to have information on statistical data, a legislative framework that regulates punishments and intervention procedures, the persons involved, the effects on the consumer and the social group, but also the way to prevent and combat the phenomenon.

I will briefly exemplify the information made available in the workshop organized by me.

The victim (the oppressed), the first character we will study is identified in our problem as a drug user and will be played in each group of 5 people, by a student who

drew lots.

The oppressed is identified by the Consumer, so those who have drawn the ticket with the role of the oppressed will be very attentive to the information material in order to build their lines and to add expressiveness to their character in the improvisation and acting exercises (Day, 2002).

If we were to define the drug user, we would have to refer to the social and family context, to the state of health, but also to the traditions and customs inherited or acquired as consumers in the family, rituals, genetic inheritance (Crețu, 2003). Whether influenced by poor health, physical problems, genetic predispositions, family problems, group influence, social or cultural status, the consumer is a vulnerable and influenceable pattern (Substance Abuse and Mental Health Services Administration, n.d.). This profile is trying to change something they are not comfortable with, they want to join a social group, or they want to try new sensations, they are rebellious, they are looking for material or social gain through this method. Drug users seem to lack the necessary resources to cope with the demands of daily life, they are unstable in terms of feelings, they are at odds with society and the authorities. Many of them complain of depressive states, anxiety, but it is not sure if these are the causes or consequences of drug addiction (Rășcanu, 2004).

First of all, for the construction of the role, the motivation for which drugs are consumed is important, but also the impact it has on the consumer. In addition to this information, they also need to know who the support group is, how they relate to the authorities but also to the dealer, family and friends. Emotional problems affect the essential dimensions of the child's development, disrupt the functionality of all his psychic levels. Their effects are profound and harmful, and can accompany the individual throughout his or her entire life (Olărescu & Veleanovici, 2016). Emotional problems refer to subjective states, reactions and experiences related to emotions that can affect a person's functioning and well-being. These can include mood disorders such as depression and anxiety, emotional trauma, difficulties in regulating and expressing emotions, as well as other difficulties in managing and adapting to emotional situations and relationships that can negatively affect the individual's quality of life and influence their social interactions, behaviors, and mental and emotional health.

Short-term effects of drug use include euphoria, feelings of relaxation or arousal, changes in sensory perception, and inhibition of cognitive and motor abilities (National Library of Medicine, 2023). However, drug use can also lead to negative effects, such as anxiety, paranoia, loss of control, risky behaviors, and accidents. In the long term, drug use can have devastating consequences on physical and mental health. These include addiction, impaired cognitive function, cardiovascular problems, damage to the respiratory system, impaired liver and kidney function, mental and social disorders, and the risk of overdose and death (National Library of Medicine, 2023).

Addiction and withdrawal syndrome: long-term drug use can lead to the development of physical and mental dependence (Rășcanu 1999). Abrupt cessation of consumption can cause withdrawal syndrome, which can include symptoms such as anxiety, irritability, insomnia, muscle and joint pain, nausea, and vomiting (Rășcanu, 1999).

Overdose and death: In some cases, drug use can lead to overdose, which can be fatal. Overdose can cause serious health problems such as respiratory failure, heart attack, or stroke (National Library of Medicine, 2023).

The aggressor, the second character we will study, is identified in our problem as a drug dealer and will be played in each group of 5 people, by a student who drew lots. Some psychologists interpret delinquency as a way of "adapting" to a supposed physical inferiority or frustration, which can generate a tendency towards aggression and violence

(Rotari 2010).

The aggressor or trafficker is most of the time a former or current consumer, so he will need all the information that the victim has, and something extra, the need for money or the constraint of the group to which he belongs. Erving Goffman identifies three types of stigmatized, namely: those with physical defects, those with characterological defects (mental disorders, drug addicts, homosexuals, unemployed, addicts...) and those socially marginalized (religion, ethnicity, nationality, belonging) (Goffman, 2009).

The study of the group that supports each category of stigmatized people is relevant because, depending on its size, it can develop aggressors or victims. There are three categories of supporters: similar, (those who understand and accept them, with whom a gang of aggressors is often formed), caregivers and therapists. All three categories have the potential to develop deviant behaviors, gangs but also numerous victims.

If those stigmatized on the basis of character defects generally become aggressors, those in the other two categories (with physical defects or belonging to a minority structure) tend to become victims if they are not in groups that support them or that have the same kind of stigmatization (Goffman, 2009). Gangs and the social environment, on the other hand, or belonging to various criminal groups, make it increasingly difficult to escape from an aggressive and violent environment, thus perpetuating themselves in the environments practiced outside the frequented group, with equally aggressive attitudes and behaviors.

If a few years ago we were talking only about delinquent groups, tributary to a certain cult or a certain behavior established as a rule, we were talking about sub-civilized countries or criminal sub-cultural areas where violence is practiced at all levels, today we are talking about aggressiveness among adolescents who are sympathetic to these currents and who increasingly enter schools in the environments practiced by adolescents, thus influencing the entire society. When we refer to violence in schools among adolescents, we can talk about drug use, according to a report by the World Health Organization (World Health Organization, n.d.).

The third, ally that we will study is identified in our problem as a parent or friend and will be played in each group of 5 people, by a student who drew this character by lot. What can a parent do when they realize that their son or daughter is a drug user?

Ferréol (2000) points out that parents consider that adolescents who have tried drugs or have used them regularly have certain characteristics: they have problems in communication and relationships with others; they lack confidence; they feel dissatisfied in many ways; they are more nervous, agitated, tense, vulgar and violent than others; rejects the power of parents and teachers; they have parents with money; are not supervised; the parents do not know the entourage;

The National Anti-Drug Agency of Romania has come to the aid of parents and consumers with a series of programs precisely to help them in the fight against this problem. The 9 programs are also explained as a way of carrying out and as a possibility of participation on the A.N.A. websites: Judge or Help, Uncensored, Empower for Action, National Project Me and My Child, National Drive Clean Project, Serenity Family Prevention Project, Drug Use Concerns Us All, Ground-#amc Is You, Safe Space (Agenția Națională Antidrog).

The measures that the parent and friend can take are those related to the affective relationship and the power of persuasion, persuasion, at the psychological level (Olărescu, Veleanovici, 2016) and those in which he appeals to the authorities.

The Observer, the fourth character we will study, is identified in our problem as a policeman or a doctor and will be played in each group of 5 people, by a student who drew lots.

What should this person know about drugs? He should know the legislation, the solutions, but in forum plays he does not intervene effectively and this is where the audience intervenes and takes a stand and replaces this person most of the time.

In our workshop, the Romanian legislation has some useful information for the one who studies the role, namely: (2) If the persons hospitalized urgently+ for complicated withdrawal do not present identity documents or other documents from which their identity results, the unit that performs the internment notifies the police station in whose territorial radius it is located, in order to establish the identity of the interned person. Art. 34. - The hospitalization of persons without exercise capacity or with restricted exercise capacity will be done only with the consent of a legal representative, except for emergency situations caused by complicated withdrawal. Art. 35. - In order to ensure the effectiveness of the treatment, people who are hospitalized on their own initiative have the obligation to follow psychosocial post-cure rehabilitation at the end of the detoxification period. Art. 36. -(1) In case of hospitalization on request for the detoxification cure, the patient shall sign a commitment (2) Failure to comply with the commitment provided in para. (1) entails the immediate discharge of the patient (Lege nr. 143/2000, Parlamentul României, 2000).

In the case of drug trafficking and consumption, consumption is not criminalized by Law 143/2000, but the possession of high-risk drugs for one's own consumption, without right, is punishable by imprisonment from 3 months to 2 years or a fine and the possession of high-risk drugs for one's own consumption, without right, is punishable by imprisonment from 6 months to 3 years. But students can also access other scientific sources for documentation.

The joker is the fifth character chosen by lot, he is the mediator of the group of five amateur actors, pupils, students or members of the community. He will clarify with the audience which of the characters can be changed, that is, who did not do their duty well in the play. As the main characters said, the oppressed and the oppressor do not change, so he will only replace the others. Sometimes there are also requests to add new people or make time jumps. How to deal with such proposals is in the hands of the Joker.

The play is performed once and then, the audience should think about the changes that could be made. A good way to initiate reflections is to let the audience discuss their ideas for a few minutes in small groups. If there are a few ideas, the play is played a second time until someone in the audience shouts "stop" and takes on the role. A good play should challenge the audience in such a way that they can no longer bear to see the same situation again and therefore feel the impulse to want to change something. In most cases, there is a personal emotional concern that causes someone to intervene.

Now, if a person comes on stage, it is advisable to be applauded and encouraged, this role being played by the joker. The stage should not be a classic one, so a university amphitheater or a classroom is also indicated. It is beneficial if the audience is close to the stage so that the audience does not feel embarrassed or ashamed to put themselves in the spotlight.

Joker welcomes everyone, introduces himself and the actors and briefly explains the context and procedure of the Forum Theatre. Joker leads the warm-up, leads the scene (e.g. a small introduction: where and when the whole scene takes place, the title of the scene, the introduction of the characters, etc. The process of training social theatre actors for the future facilitation of group work takes place in the space of trust, dialogue and equality, making social theatre a safe and creative space (Boal, 2013).

### **C. Construction of the script and lines**

The coordinating teacher has a very important role, because he will have to provide the groups with a script scheme, in which each participant will create lines for his character following the information from the documentary film and the material made available to the participants by the coordinator. The scenario that I will bring as an example, a few scenes for each group has the same structure.

The coordinating teacher is the one who organizes the scenario and provides the groups of 5 students with the scheme that they are going to complete with replicas. The script must contain the stages and evolution of a consumption situation, starting with the place of development (related to the environment) stage (withdrawal state, meeting with the dealer, flagrante, legal solution, effects of intervention), the number of lines for each character and the characters involved in each scene.

The coordinator will also specify the situation definitions for each group of 5. For example, in group 1 the victim is motivated by lack of money, in group 2 by medical problems, in group 3 by family or couple misunderstandings, social exclusion (Pânișoara, 2011).

In our group there are 6 groups of 5 students, and in each group we have the five typologies, so we proposed to the groups to choose different motivations of the oppressed:

The first group chose mood disorders, related to mental health such as depression and anxiety, for the oppressed;

The second group chose emotional trauma, difficulties in regulating and expressing emotions, and other difficulties in managing and adapting to emotional situations and relationships; The third group chose family problems, misunderstandings and shortcomings, poor communication but also harshness or carelessness on the part of the family, which can be either with good material status but not involved or too harsh and aggressive and full of material deprivation; The fourth group chose problems of a family nature, a lack of communication, with a bad material status, harsh and aggressive, full of material deprivations, The fifth group chose problems of social integration, stigmatization and belonging to the gang. The need to belong in this case leads to the need to conform to the rules of the group that involve delinquency, drug use and other habits; The sixth group chose a victim's problem, also related to social integration, but this time for the need for acceptance in groups that are of a different social status.

Script used in the workshop and the information provided for each character is exemplified as follows: each character will have 2-3 lines / phrases, in each scene people will keep their characteristics, the scenes take place in the indicated spaces.

Each scene has a maximum of 10 lines suggestive of the theme of the scene:

WORKING SCENARIO

Scene 1 / VICTIM'S HOME (TRIGGER)

VICTIM-WITNESS

Scene 2/ IN THE CITY / AT THE SUBWAY / TRAIN STATION (AGGRESSION)

VICTIM-AGRESSOR

Scena 3 IN THE CITY.... (FLAGRANT)

VICTIM – AUTHORITY

AUTHORITY-AGRESOR

Scene 4 IN THE CITY (THE SOLUTION)

AUTHORITY-FAMILY

FAMILY-VICTIM

Scene 5 HOME (POSSIBILITY OF REHABILITATION)

VICTIM – WITNESS

On this kind of scenario, the lines of each participant who already knows what character they are playing will be completed. Each group will create their own story and build the characters as they wish, taking into account the number of lines in each scene for each character.

#### **D.Preparation with improvisation exercises, acting and interpretation of the forum play**

During the improvisation exercises, both the mind and the body and the emotional will be trained. Each group will choose a story in which the victim will have different motivations for drug use. The situations will be narrated by each group and after this moment a non-verbal improvisation will be created to request bodily expressiveness (Stanislavski, 1955). This is followed by exercises on typologies and voice in which the characters talk on the phone as expressively as possible, each telling the story that brought them to the situation presented in the script.

This process of research in dramatic art results in the creation of a Forum play. Participants in the Forum Theatre project act as active research subjects and actors in all previous phases of dramatic research with Forum Theatre; They combine their individual experiences and points of view to create collectively projected images and theatrical scenes, forming a product that can expressively communicate the social problem (Schutzman, 2002)

#### **4. Conclusion**

The final brainstorming of the workshop participants brought a crosshair, an extra information related to the support group, the correct attitude and empathy, the punishment for the crime but also the solutions in the case of the victim. Also, from the description in the answers, you can see an accuracy of the information compared to the first interview at the beginning of the workshop.

The students witnessed the performance of their colleagues from the other groups and intervened in the presentation stage of the joker, and the fact that they were so well informed about the subject and the solutions made this three-hour exercise of forum theater a success.

Social theater is a form of interactive education, even as a documentary for those who prepare such a script, its preparation must be the most complex, both emotionally and cognitively, having the role of directing the show in the relationship with the audience and the construction of solutions (Boal, 2013).

Social theatre is one of the modern methods of educating young people, a creative way to convey information on responsible, risk-free behaviour (Boal, 2013). This non-formal method of education allows not only social theatre actors, but also the audience to get involved in identifying solutions and solving existing problems. Social theatre is considered an effective tool for ensuring social change.

This kind of theater also has an educational component, because both those who prepare the show and those who are spectators have a major cognitive and emotional involvement. Any emotionally impregnated and "animated" information is much better perceived, because theater means communication at all levels (Stanislavski, 1955).

Forum theatre is an effective means of changing attitudes and solving social problems, such as drugs. Used correctly, it empowers the public to find solutions and solve these problems in a participatory way, being a tool that contributes to increasing involvement in society's problems (Piekkari, 2005). Forum theatre can be used as an alternative form of education, which engages the community in recognizing and solving social problems.

As a drama teacher and from the experience of over 100 acting workshops with students and pupils, I found that this well-documented and well-structured way of working can have a very strong impact on both the protagonists and the audience. This working model has demonstrated that forum theater is truly an interactive one, which allows the audience to realize that they can become the promoter of change, that they can solve problems that affect their lives through this communication and involvement at all levels of perception, emotional, cognitive and physical (Piekkari, 2005).

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# Empowering Educators: A Sociological Analysis of Work Engagement in Timiș County

Ionela – Andreea STOICOV

PhD Student, West University of Timisoara (Romania)

Email: ionela.stoicov@e-uvt.ro

**Abstract:** *The emergence of the COVID-19 pandemic brought about numerous changes, and one of the sectors most profoundly impacted was the education system. Both students and teachers had to adapt to new modes of learning and teaching, respectively. This study aims to analyze the engagement of teaching staff in their professional activities during the specified reference period. Schaufeli's engagement scale, structured into three factors, was used to accomplish this objective. The scale was adapted to the new context to assess its impact on the level of engagement among teachers in their professional roles. This study, involving 172 participants, investigates the work engagement of public-school teachers in the Western region during the pandemic. The research adopts a quantitative approach due to the number of respondents covered, employing the UWES scale and additional subject-specific questions and socio-demographic variables in an online questionnaire. The findings offer valuable insights into the pandemic's effects on teachers' work engagement in the region; however, it is essential to note that these findings may not be broadly applicable to all teaching staff in Timiș County.*

**Keywords:** work engagement; education; teachers, challenges; pandemic.

## 1. Conceptual and theoretical framework

The present article involves research that focuses on the work engagement of teachers from Timiș County. Work engagement represents a positive state of emotional and motivational involvement in professional activities. Most of the time, work engagement is the opposite of burnout, with engaged employees showing a high level of energy that they invest in their work, demonstrating enthusiasm and dedication.

The role of teachers in education is significant, as they impact students' formation and development through their involvement, competence, interest, and passion in their profession. Therefore, teacher involvement in educational activities directly influences the education system's performance (Guțu, 2021).

The following sections discuss several definitions of work engagement, theories used to explain this phenomenon, the effects of work engagement, and the dimensions of the concept of interest.

### 1.1. Defining the concept of work engagement

The concept of work engagement was first utilized in 1990, and since then, according to Schaufeli (2012, p. 3), it has been the subject of at least 200 articles. However, according to more recent research by Bakker and Albrecht (2018, p. 4), the number of studies presenting the concept in various contexts and forms has rapidly increased in the last two decades. Thus, it is not coincidental that this construct is used in business and academic settings. (Schaufeli & Bakker, 2010, p. 10; Schaufeli, 2012: 3).

Kahn (1990, p. 694) was the first to conceptualize work engagement from an ethnographic perspective. He described it as harnessing organizational members to their work roles, whereby people engage and express themselves physically, cognitively, emotionally, and mentally during role performance. Therefore, according to him, engagement produces positive outcomes both at the individual level through personal growth and development and at the organizational level, as reflected in performance quality.

Work engagement refers to a positive, affective-motivational state of high energy, high levels of dedication, and a strong focus on work (Schaufeli & Bakker, 2010; Bakker & Albrecht, 2018: 4). In a more recent article, Schaufeli (2012, p. 3) provides a broader definition of engagement, which in everyday life refers to involvement, commitment, passion, enthusiasm, absorption, sustained effort, and energy. However, dictionaries do not capture the phenomenon in all its significance.

According to a global survey of executive directors, employee engagement is one of the top five challenges for organizations (Wah, 1999). Therefore, it has been opportune for international business consulting firms to develop their survey tools, leveraging international databases that cover various industries. By extrapolating the data, these companies estimate that approximately 20% of employees are highly engaged, 20% are not engaged, and 60% show moderate commitment (Attridge, 2009). The trend observed by these firms is that employee engagement leads to business success.

Despite the more or less comprehensive definitions, which at first glance seem different, employee engagement is conceived in terms of emotional/affective attachment to the organization and discretionary behavior that promotes the organization's efficient functioning (Schaufeli, 2012: 3). The concept of employee engagement first appeared in the business environment. However, the term's origin is unclear.

If we question the interest in this topic, the answer and, implicitly, the justification for numerous articles are simple and consist in the fact that both private sector employers/organizations and those from the public sector consider it desirable to have employees with increased work engagement, as it has been demonstrated that engagement coincides with: high levels of creativity, job performance, organizational citizenship behavior, and customer satisfaction (Bakker et al., 2014). While previous research had an interpersonal character, focusing on differences in engagement at the individual level at work according to working conditions, personal characteristics, and behavioral strategies, current research brings an intrapersonal perspective, highlighting that engagement can fluctuate within the same person at different times and situations. High levels of engagement have been observed during difficult work episodes, during workdays preceded by evenings when employees rested, and when they had access to resources (Bakker & Albrecht, 2018: 4).

Studies have shown that the predictors of work engagement can be both direct and indirect: Leaders, as well as human resource practices through job redesign, can contribute to increasing employee involvement in the workplace (Holman & Axtell, 2016).

According to Xanthopoulou et al. (2009), work engagement is essential because it is a very good predictor of factors such as the importance of employee, team, and organizational outcomes. Due to their dedication, highly engaged employees achieve better performance and financial results. Moreover, Costa et al. (2015) highlighted that work engagement is positively associated with team performance at the team level, with dedicated employees inclined to help their colleagues.

## **1.2. Theories used to explain work engagement**

JD-R (Job demands-resources theory) is one of the most widely used theories that explain engagement, according to which the combination of job characteristics and personal resources predicts job performance through employee engagement (Bakker & Demerouti, 2017). Thus, engagement is most likely when employees face significant challenges and have sufficient resources to cope with them (Bakker & Sanz-Vergel, 2013). According to this model, job and personal resources become more important, and employees have higher motivational potential when they face high job demands. These

jobs are termed "active" because employees become motivated to learn and develop their skills.

The affective shift model assumes that work engagement arises from the dynamic interaction of positive and negative affects, and negative effects are related to work engagement if a positive one follows it.

### **1.3. Consequences/Effects of work engagement**

Possible consequences/effects of engagement refer to positive employee attitudes towards work, health, and well-being, behavior that promotes the efficient functioning of the organization, and job performance (Schaufeli & Salanova, 2008).

Compared to those who are not engaged, engaged employees feel a greater commitment to the organization, are absent less often and do not intend to leave the organization. They also experience positive emotions and enjoy very good mental and psychosomatic health. They have initiative and a strong motivation to learn new things, so they are willing to put in extra effort at work. They report fewer mistakes, are less often involved in conflicts, exhibit innovative behavior, and receive better evaluations regarding efficiency and performance at work than their colleagues.

Engagement has been studied as a pattern of responses to a challenging work environment in field studies and as a more dynamic and temporal construct in laboratory studies. This aspect has been a source of inspiration for Schaufeli and Salanova, who distinguished between two types of work engagement: general job engagement, which refers to the job in general, and task-specific engagement, which refers to the specific task at hand, noting that the workplace consists of multiple tasks and employees might feel engaged while performing some tasks rather than others (2008).

Work engagement is related to other constructs such as burnout, work-related boredom, job performance, and others (Schaufeli et al., 2002).

A significant consequence in the workplace is job performance due to its relevance to organizations. However, what are the reasons why engagement leads to performance? Schaufeli and other researchers argue that six pathways are involved. Firstly, employees experience positive emotions, which broaden their thinking-action range, thereby acquiring new skills and knowledge and facilitating performance. Secondly, more engaged employees are healthier, thus reducing absenteeism, leading to better focus on work and, consequently, increased productivity among them. Thirdly, engaged employees personalize their jobs to fit their needs and values, increasing motivation and, implicitly, performance. Engagement will likely stimulate cognitive openness, which involves information processing and behavioral preparedness through personal initiatives. Fifthly, engaged workers exhibit prosocial behavior, which can propagate among their colleagues, contributing to a positive social climate emphasizing collaboration and team performance. Lastly, the transfer of commitment/engagement to others through a process of emotional contagion - the engagement of one person can transfer to others, thereby improving team performance.

### **1.4. Dimensions of the concept of work engagement**

As stated above, work engagement is characterized by vigor, dedication, and absorption, the three dimensions that underpin the applied instrument. According to Schaufeli (2012), they can be defined as follows:

Vigor is a behavioral-energetic component characterized by high energy levels, mental resilience during work, and a willingness to persevere in the face of difficulties, even if it involves sustained efforts.

Dedication is an emotional component that involves strong involvement in one's work and experiencing feelings of significance, enthusiasm, inspiration, pride, and challenge.

Absorption is a cognitive component characterized by full concentration and satisfaction with one's work. When someone is absorbed in their work, time passes faster, and detachment from professional activity becomes more difficult.

## **2. Methodology**

### **2.1. Research model**

The research aims to understand the influence of the pandemic's effects on the engagement of pre-university teachers in their educational/professional activities. The research instrument used to obtain results is the Utrecht Work Engagement Scale (UWES), the 17-item version adapted to the professional environment, although a reduced version contains 9 items (Schaufeli *et al.*, 2006). The scale includes three dimensions: vigor, dedication, and absorption, contextualized to reflect the difficulties encountered during the pandemic. The research was conducted using a quantitative approach with a convenience sample of 172 participants, with the questionnaire serving as the data collection instrument online. The questionnaire was structured as follows: Introduction, Work Engagement (evaluated using the Likert Scale, with 17 items and 7 response levels), Education in the Pandemic Context (composed of 4 questions covering the encountered difficulties, suggestions for improving the education system, elements from the online environment, and future preferences), and demographic data (gender, county, locality, residence environment, age, professional status, teaching degree, and educational level).

Four hypotheses have been formulated to achieve the proposed objectives, which will be tested to assess the extent to which the objectives are met. These hypotheses aim to analyze the differences in the teachers' perceptions of online teaching based on gender. The objectives and hypotheses of the research.

The study's three general objectives are formulated according to the dimensions underlying the research instrument, and the hypotheses generate both descriptive and statistical interpretations of the results obtained (Cauc *et al.*, 2007).

O1. Identifying the difficulties faced by pre-university teachers in conducting educational activities during the pandemic period.

O2. Measuring the work engagement of pre-university teachers.

### **Hypotheses**

H1. There is a statistically significant relationship between the respondents' gender and how they perceived the difficulties experienced during the pandemic, particularly regarding the technical difficulties that recorded the highest score.

H2. There are statistically significant differences between the responses of female and male teachers regarding the composite score obtained on the vigor dimension (high levels of energy and mental resilience during work).

H3. There are statistically significant differences between the responses of female and male teachers regarding dedication.

H4. There are statistically significant differences between the responses of female and male teachers regarding absorption.

### **2.2. Participants**

The investigated population includes pre-university teachers from Timiș County, regardless of teaching degree, seniority in education, the curricular cycle taught, or residence environment provided they taught during the pandemic period. The study had

172 participants: 135 females and 37 males, averaging 45.75 years. Most respondents live in urban areas (131), while 41 are from rural areas. Among them, 139 are permanent teachers, and 33 are substitute teachers. Regarding teaching degrees, 99 have a first teaching degree, 25 have a second teaching degree, 32 have permanent teaching certification, and 16 do not possess any teaching degree. The educational levels at which they teach are secondary school (74), primary school (71), high school (64), and professional and technical education (29). The profile of the subjects taught includes primary cycle (49), Language and Communication (32), Mathematics and Sciences (25), Human and Society (25), Arts (6), Physical Education and Sports (7), Technologies (24), and Counseling and Guidance (4).

### **2.3. Data collection tools**

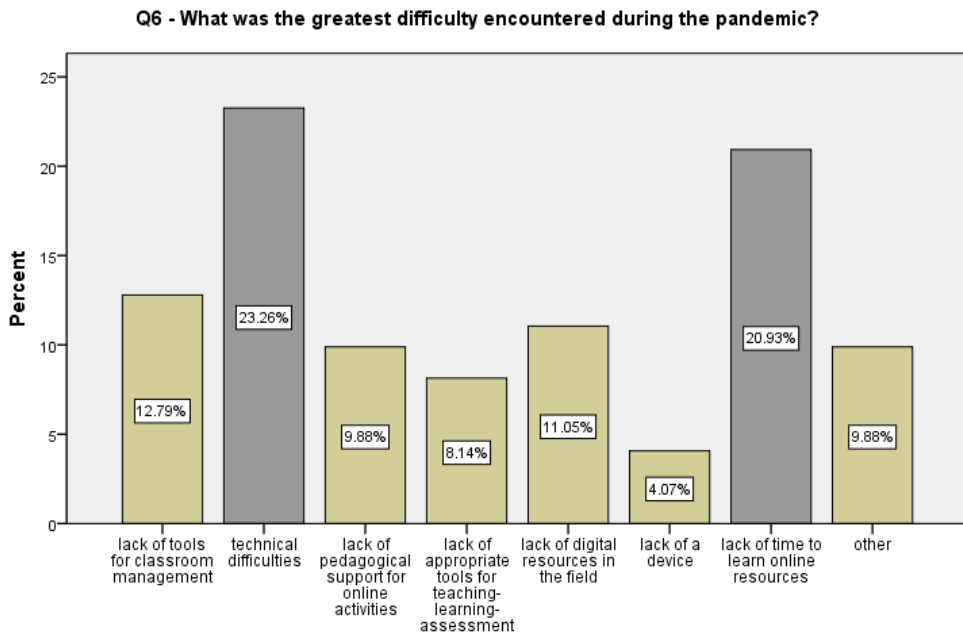
The questionnaire created on the QuestionPro platform was distributed directly to the targeted population via email and indirectly through institutions such as the Timiș County School Inspectorate and the Timiș County Teacher Training Center. Teachers were encouraged to share the link on professional groups to gather as many responses as possible. The data collected online could be monitored in real time. One hundred seventy-two responses were recorded.

We limited ourselves to Timiș County to conduct the research, as this study aims to analyze its specific situation. Despite the limited coverage, one of the research's constraints is the small number of subjects, considering the large number of schools and teachers operating throughout the county. Nonetheless, the respondents are valid representatives of the counties in Romania.

Another limitation is the disproportionate number of representatives of the two genders, with 37 male and 135 female respondents. Additionally, the unequal distribution of subjects in various categories, such as teaching grades, status held, the profile of the taught discipline(s), educational level, age, and residence environment, represents other significant limitations. Therefore, only sociodemographic variables that can provide relevant results for the research were included in the statistical analyses.

### **3. Results**

Regarding the ranking of difficulties encountered by teachers in their professional activities during the pandemic, the top two positions, with close scores, are technical difficulties with 23.26% and the lack of necessary time to understand and adequately use digital tools and resources with 20.93%. The lack of tools for classroom management (12.79%), as well as the absence of educational content (digital resources) in the field, are responses that are ranked below the top two.



**Graphic 1 - Difficulties encountered during the pandemic**

### **H1. Technical difficulties - respondents' gender**

The most significant difficulty teachers faced during the pandemic was technical in nature. In the following, we will verify the hypothesis that a statistically significant relationship exists between the respondents' gender and how they perceived technical difficulty, which recorded the highest score.

The Chi-Square association test was used to evaluate this hypothesis's validity. A new variable was created with two response options: 'Yes,' which includes respondents for whom technical difficulties represented the most significant challenge during the pandemic, and 'No,' which includes respondents for whom technical difficulties were not the greatest. Thus, we were able to investigate the validity of the hypothesis.

**Table 1 – Gender – technical difficulties****Gender - technical difficulties**

			Was the most significant difficulty you faced during the pandemic technical?		Total
			yes	no	
Q10 - Gender: feminine	Count		31	104	135
	% within tehnic		23.0%	77.0%	100.0%
	Adjusted Residual		-.2	.2	
masculine	Count		9	28	37
	% within tehnic		24.3%	75.7%	100.0%
	Adjusted Residual		.2	-.2	
Total		Count	40	132	172
		% within tehnic	23.3%	76.7%	100.0%

**Chi-Square Tests**

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	.030 <sup>a</sup>	1	.862	.830	.509
Continuity Correction <sup>b</sup>	.000	1	1.000		
Likelihood Ratio	.030	1	.863		
Fisher's Exact Test					
Linear-by-Linear Association	.030	1	.863		
N of Valid Cases	172				

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 8.60.

b. Computed only for a 2x2 table

Of 172 respondents, 23.3% of technical problems represented the greatest difficulty during the pandemic. In contrast, 76.7% faced various other issues, such as the lack of time needed to understand and adequately use digital tools and resources, the lack of tools for managing the classroom, the lack of educational content in the field, the lack of pedagogical support for conducting engaging activities, the lack of appropriate tools for teaching-learning-assessment, the lack of a device, and others. Among respondents who consider technical difficulties the greatest problem, we can observe that both women and men encountered issues when they had to use technology to carry out professional activities in a completely new context, but in different proportions, respectively 23% and 24.3%. These tests reveal no statistically significant relationship between technical skills and the respondents' gender (Pearson Chi-Square = .030;  $p = .862$ ). Therefore, we can affirm that the technical problem depends on each respondent's ability to manage them, with some possessing more developed technical skills than others.

**H2. Vigor – gender****Table 2 - Vigor – gender (Independent sample T-test between female and male gender regarding high levels of energy and mental resilience of teachers, manifested in professional activity.)**

Gender:		N	Mean	Std. Deviation	Std. Error Mean
Vigor	feminine	135	6.0272	.83686	.07203
	masculine	37	5.7117	1.30977	.21533

The independent samples t-test was conducted to determine if there are statistically significant differences between female and male respondents regarding vigor as a dimension of work engagement. According to the results reported in the table above, there are no statistically significant differences between the two genders, with males showing ( $M=6.02$ ,  $SD=.83$ ). It can also be noted that the t-test  $t(44.35)=1.77$ ,  $p=.172$  ( $p>.05$ ) indicates no significant differences between the two genders; thus, the hypothesis is rejected.

**H3. Dedication-gender****Table 3 - Dedication-gender (Independent samples t-test between female and male genders regarding the professional dedication of teaching staff at work.)**

Gender:		N	Mean	Std. Deviation	Std. Error Mean
Dedication	feminine	135	6.3556	.79049	.06803
	masculine	37	6.1568	1.12560	.18505

Through the T-test, a comparison was made between the female and male genders regarding work dedication. Thus, based on the results visible in the table above, it can be reported that between the two groups, namely male respondents ( $M=6.15$ ,  $SD=1.12$ ) and female respondents ( $M=6.35$ ,  $SD=.79$ ), there are no statistically significant differences concerning the dedication shown in a professional context during the pandemic period. It can also be noted that the t-test value ( $t(170)=1.22$ ,  $p=.22$  ( $p>.05$ )) exceeds the significant threshold of 0.05, indicating that no significant distinctions can be made between the two genders regarding work dedication as a dimension of professional engagement. Therefore, it can be concluded that there are no statistically significant differences between the two genders; thus, the hypothesis is rejected.



#### H4. Absorption-gender

**Table 4 - Absorption-gender (Independent samples t-test between female and male genders regarding job satisfaction.)**

Gender:	N	Mean	Std. Deviation	Std. Error Mean
Absorption feminine	135	5.8111	1.25332	.10787
masculine	37	5.8694	1.19292	.19611

To compare the job satisfaction between female and male respondents, an independent samples t-test was conducted. Based on the results obtained in the table above, it can be reported that there is no statistically significant difference between the two genders, male ( $M=5.86$ ,  $SD=1.19$ ) and female ( $M=5.81$ ,  $SD=1.25$ ), regarding job satisfaction. Additionally, it can be noted that the t-test value  $t(170)=.25$ ,  $p=.80$  ( $p>.05$ ) indicates a significance threshold greater than 0.05, emphasizing that there are no considerable statistical differences between the two variables analyzed. Therefore, it can be concluded that there are no statistically significant differences between the two genders regarding job satisfaction. Thus, the hypothesis is rejected. Therefore, it can be concluded that there are no statistically significant differences between the two genders; thus, the hypothesis is rejected.

#### 4. Discussion and conclusions

This paper represents evidence of teachers' involvement in their professional activity, even in the challenging times of the pandemic, which significantly impacts the development of students' training and education. This study can be replicated at the level of teachers from other geographical regions or even nationwide, and different comparisons can be made between the levels of teacher involvement in different counties in their teaching activities.

It can be noted that the most significant difficulty encountered by many teachers during the pandemic consisted of technical problems, demonstrating the efforts they made to perform their profession under any conditions and in any form. However, it is noteworthy that some teachers managed these technical problems better than others, with male respondents and those from urban areas showing greater skill and openness in using and integrating modern means that facilitate and modernize the educational process.

Furthermore, we can conclude that demographic factors such as gender did not change how teachers from Timiș County participating in the study showed their involvement in their professional activity during a period that will remain emblematic due to the changes it brought about. Thus, there were no statistically significant differences between female and male respondents regarding the three dimensions of work engagement.

It is important to mention that the results provided represent a general overview of the situation during the pandemic period without being able to be generalized and extrapolated to the entire population of teachers across the county.

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# Loneliness Between Structural Objectivity and Lived Subjectivity: An Integrative Analysis of Contemporary Sociological Theories

Vlad Ovidiu CIOACĂ

PhD, Doctoral School of Social and Human Sciences, University of Craiova (Romania)

Email: cioacavladovidiu@gmail.com

**Abstract:** *This article develops a comprehensive and original perspective on the phenomenon of loneliness, offering an interdisciplinary theoretical synthesis and proposing an innovative conceptual framework. Starting from the classical distinction between emotional and social loneliness, the analysis expands by integrating five major sociological paradigms: structural functionalism, symbolic interactionism, sociological constructivism, critical theory, and social network theory. Each of these approaches highlights specific dimensions of loneliness, from the dysfunctions of social cohesion to symbolic representations and dominant discourses that shape public perception. The empirical contribution of the article consists of a content analysis of Romanian online media, revealing a tendency to portray loneliness in predominantly negative and conceptually unrefined terms. At the theoretical level, the article formulates a new model — the relational ecology of loneliness — which offers a stratified reading of the phenomenon, conceived as an emergent imbalance between actual social ties, cognitive and affective representations, symbolic frameworks, and institutional structures. Through this approach, the article transcends unidimensional explanatory models and contributes to a reconceptualization of loneliness as a simultaneously social, cultural, and psychological phenomenon.*

**Keywords:** *loneliness; relational ecology; sociological paradigms; media representations; integrative model*

## 1. Introduction

Despite its apparent semantic simplicity, loneliness emerges as a profoundly ambiguous and polymorphic construct situated at the intersection of individual affective experiences and the structural configurations of society. Far from being reducible to a mere quantitative deficit of social relationships or to an isolated emotional state, loneliness involves a complex network of cognitive, symbolic, normative, and structural determinants. These dimensions demand an integrative and multidisciplinary approach. The specialized literature consistently underscores the conceptual distinctions between loneliness and social isolation, between the positive and negative forms of relational withdrawal, as well as between the emotional and social experiences of relational absence—highlighting the multiple ways in which this phenomenon is theorized and operationalized.

The present inquiry aims to provide a systematic mapping of sociological theories relevant to the understanding of loneliness, with a particular emphasis on the constitutive tension between the objective dimension of relational structure—accessible through measurable indicators and observable social networks—and the subjective dimension of relational perception, shaped by internal standards, cognitive mechanisms, and affective representations. In this regard, the article analyzes contributions from structural-functionalist, interactionist, constructivist, critical, and social network paradigms, with the goal of articulating a coherent interpretive framework that enables a multiperspectival understanding of the phenomenon.

The problematization of loneliness is not merely a matter of sociological ontology; it also entails an epistemological reflection on the ways in which concepts are constructed, differentiated, and applied within scientific discourse. Consequently, the article examines

both explanatory theories and the methodological and practical implications of distinguishing between the various forms and determinants of loneliness. Moreover, it proposes an analytical differentiation between loneliness as a state (a temporary outcome of a specific relational configuration), as a trait (a recurrent psychosocial predisposition), and as a social symptom (a systemic effect of structural dysfunctions).

Through this approach, the article seeks not only to offer conceptual clarification but also to lay the groundwork for a sociological perspective capable of addressing both the theoretical complexity and the pressing social relevance of a phenomenon whose incidence is steadily increasing in contemporary societies.

## 2. Loneliness: Definitions and Classification Criteria

The earliest known work to systematically address the phenomenon of loneliness is *Über die Einsamkeit* (Zimmermann, 1785), which adopts a predominantly theological lens in approaching the subject. More recent conceptual developments began in the 1950s, notably with Frieda Fromm-Reichmann's 1959 essay *Loneliness*, which, while contributing important clarifications to the term, remained largely within the bounds of philosophical speculation. The first empirical investigations of loneliness were initiated by Perlman and Peplau (1981), who defined it as "the unpleasant experience that occurs when a person's network of social relationships is deficient in some important way, either quantitatively or qualitatively." A second definition, frequently employed in European literature, conceptualizes loneliness as "a specific type of situation in which an individual perceives the absence—or insufficient quality—of relationships considered important to them, and this absence is experienced as unpleasant." Central to both definitions is the understanding of loneliness as a subjective and negative emotional state, resulting from the discrepancy between existing relational conditions and socially or individually desired standards.

Loneliness is most often analyzed in relation to the adjacent concept of *social isolation*. Social isolation refers to the objective features of a situation and is measured through objective or semi-objective indicators (e.g., the number of people the individual has interacted with face-to-face or by phone in the past week, the number of neighbors with whom regular interaction occurs, etc.). The theoretical framework often places these two phenomena on opposite poles of a continuum: social isolation versus social participation. When understood as Weberian ideal types, these polarities serve a valuable analytical function. In practice, no individual is ever entirely isolated, nor fully socially integrated. Both extremes would likely generate significant pathological effects. Hence, individuals who maintain very few significant social connections—measurable through specific instruments such as scales or behavioral indicators—can be described as relatively socially isolated.

However, loneliness is not directly contingent upon objective social isolation. Their conceptual association demands considerable epistemological caution, and their interchangeable use is, at most, acceptable within colloquial language or everyday discourse. Loneliness should be viewed as one of several possible outcomes of a life context marked by limited interpersonal interaction. Whereas social isolation denotes a measurable reality, loneliness emerges from the subjective interpretation of that reality. It is constituted through a constellation of attitudes, emotions, and feelings shaped by the individual's internalized position regarding their social circumstances. For instance, if subject X maintains ten stable interpersonal relationships and subject Y maintains twenty, one may argue that X is more socially isolated than Y, yet no definitive conclusions can be drawn about their respective degrees of loneliness. Socially isolated individuals are not necessarily lonely, just as lonely individuals are not inherently socially isolated.

An individual who is objectively well-positioned in terms of social participation may, in practice, occupy any point on the subjective continuum of loneliness. The placement on this continuum depends primarily on the standards to which the person relates. One's representation of what constitutes desirable social relationships—both in nature and in density—is shaped over time by a multitude of factors: genetic predispositions, personality traits, familial models and parenting styles, early socialization experiences, value orientations, religious, political, and philosophical beliefs, as well as the broader objective life context. Thus, while some individuals with few social contacts may experience intense loneliness, others with a similar number of connections may feel more socially integrated than their internal resources realistically allow.

Recognizing the multifactorial nature of relational standards, Perlman and Peplau applied cognitive dissonance theory to the study of loneliness. From this perspective, the intensity of loneliness increases in direct proportion to the dissonance—or perceived discrepancy—between the individual's subjective evaluation of their current social network and their personal standard for an optimal network of meaningful relationships. The cognitive approach also accounts for adaptive mechanisms: the actions a person may take to reduce the gap between actual and ideal relational conditions.

The scholarly literature identifies various components, dimensions, and typologies of loneliness. One enduring classification, originating with Zimmermann in 1785, distinguishes between positive and negative forms of loneliness—a distinction still prevalent in contemporary research. Positive loneliness is typically associated with voluntary withdrawal from the demands of everyday life and is oriented toward higher-order goals as framed by Maslow's hierarchy: introspection, reflection, meditation, spiritual connection, artistic creation, and so on. This form of loneliness is marked by a deliberate choice for solitude and a need for intimacy. The individual experiences loneliness on the subjective continuum, yet does so voluntarily and with a specific psychological aim. In this context, the temporary absence of social contact serves as a means of achieving psychological balance—indeed, a prerequisite for sustained social engagement. Excessive social integration, in contrast, may itself become a pathological factor.

Negative loneliness—commonly referenced in lay understandings—refers to the perceived absence or deficit of meaningful relationships and social contacts with individuals considered significant. This lack of connection gives rise to psychological distress and emotional suffering, aligning closely with the core definitions of loneliness presented earlier.

A more refined classification, widely accepted in the academic literature and introduced by Weiss (1973), differentiates between *emotional loneliness* and *social loneliness*. Emotional loneliness arises from the absence of a close emotional attachment—such as a partner, best friend, or sibling. It is most often experienced in the aftermath of significant relational loss, such as bereavement or divorce, or when an individual is unable—due to subjective or objective reasons—to establish such a bond. Emotional loneliness is frequently characterized by feelings of worthlessness, guilt, and self-victimization; the individual feels abandoned and wronged. These states often form the basis of depressive predisposition, within which emotional loneliness is one of the most consistently reported symptoms. Alleviating emotional loneliness requires the formation of new relationships that provide interpersonal safety and allow for the expression of intimacy.

In contrast, *social loneliness* refers to the absence of a broader network of social engagement—a lack of integration into wider groups such as friends, colleagues, or neighbors. It may coexist with emotional loneliness but stems from different structural and functional deficits in the individual's social landscape.

Social loneliness, which may coexist with emotional loneliness, is linked to the absence of a broader network of acquaintances and friends who share common interests, including professional relationships. According to Weiss (1973), social loneliness is frequently reported by individuals who have relocated to residential areas where they are newcomers—this includes young couples who move to a different environment. Regardless of the strength of the emotional bond between the partners, such a relationship cannot compensate for the void produced and sustained by the lack of a wider circle of acquaintances, neighbors, colleagues, friends, and other individuals with whom social interaction might occur. In recent years, researchers have developed distinct scales to measure emotional loneliness and social loneliness, respectively.

Weiss, also recognized as a founder of attachment theory, emphasized that most approaches to loneliness have traditionally focused on individual characteristics that predispose people to experience or remain in states of loneliness. However, a more nuanced perspective involves considering both personal predispositions and sociocultural and socioeconomic factors—elements rooted in the specific experiences individuals encounter within particular historical and contextual frameworks.

Peplau and Perlman (1981) proposed a multidimensional framework for analyzing loneliness, incorporating both individual-level and social-level variables:

a) **Descriptive characteristics of the social network** – including intimate relationships as well as broader social ties with acquaintances, colleagues, neighbors, and relatives; the regulatory and functional mechanisms of these relationships; their historical development; and the psychological functions they serve for those involved;

b) **Relationship standards** – derived from the individual's value-attitude system, which generates expectations shaped by previous relational experiences. While there is a shared normative foundation within any given society, relationship standards show considerable interindividual variation, especially in contemporary contexts that encourage increased heterogeneity;

c) **Personality traits** – such as social skills, self-esteem, shyness, social anxiety, introversion, and cognitive distortions;

d) **Sociodemographic variables and contextual indicators** – including age, gender, health status, living environment, religion, political orientation, and perceived quality of life.

In alignment with Peplau and Perlman's framework, personality traits play a central role in shaping how individuals experience loneliness. Poor social skills, low self-esteem, social anxiety, introversion, or distorted cognitive patterns may hinder the ability to initiate and maintain meaningful close relationships. Each person's relational standards—shaped by past experiences and personal value systems—generate expectations which, when unmet, can exacerbate feelings of loneliness.

At the societal level, the authors demonstrate how the structure and quality of one's relational network influence vulnerability to loneliness. The absence of fulfilling relationships with a partner, family members, or friends increases the likelihood of loneliness. Additionally, variables such as age, gender, health, residential environment, and socioeconomic status collectively shape an individual's opportunities for developing and sustaining meaningful social connections.

### **3. Sociological Theories Explaining Loneliness**

#### **3.1. The Structural-Functionalist Systemic Theory**

The structural-functionalist theory in sociology, developed by theorists such as Robert Merton and Talcott Parsons, conceptualizes society as a complex system composed of interrelated structures, each fulfilling specific functions that contribute to the overall stability and equilibrium of the social order. Within this paradigm, every component of society—whether institutions, norms, or values—plays a role in maintaining the integrity and functionality of the societal system as a whole.

Although the scholarly literature does not explicitly apply this theoretical perspective to the study of loneliness, one may extrapolate its core assumptions to this phenomenon. From a structural-functionalist standpoint, loneliness can be interpreted as either a function or a consequence of the broader societal structure, with potentially significant implications for the system as a whole:

1. **Loneliness as an Outcome of Social Structures:** In societies where norms and values emphasize individualism, autonomy, and personal achievement, some individuals may experience alienation or disconnection. Processes such as urbanization and familial fragmentation can disrupt traditional networks of social support, isolating individuals from community-based relational structures. Additionally, the cultural focus on self-realization may generate social pressures that hinder the formation and maintenance of interpersonal bonds.

2. **The Function of Loneliness:** Even negative phenomena may fulfill latent functions in the structural-functionalist framework. Although often perceived as detrimental, loneliness can act as a feedback mechanism, signaling to individuals the need to reassess their social behaviors and relational patterns. This discomfort may serve as a motivator for seeking new social ties or engaging in community activities, thereby restoring equilibrium.

3. **Loneliness as a Marker of Dysfunction:** When loneliness becomes widespread across a society, it may indicate systemic dysfunction. A high prevalence of individuals experiencing alienation or isolation could signal institutional weaknesses in entities that are supposed to foster social cohesion—such as the family, educational systems, or community organizations.

4. **Systemic Implications of Loneliness:** Elevated levels of loneliness within a population can have detrimental effects on social stability and cohesion. Isolated individuals may be less inclined to participate in communal life or adhere to prevailing social norms and values. This erosion of social integration may ultimately lead to an increase in anomie and societal disintegration.

Therefore, approaching loneliness through the lens of structural-functionalist theory provides insight into how the phenomenon both reflects and affects the structural dynamics and functional requirements of society. This analytical framework emphasizes the interdependence between individual experiences and societal configurations, illustrating how each continuously shapes and is shaped by the other.

#### **3.2. The Theory of Symbolic Interactionism**

Symbolic interactionism, developed through the foundational work of theorists such as George Herbert Mead and Herbert Blumer, focuses on the meanings of symbols and interpersonal interactions in the construction of social reality. This approach maintains that social reality is continuously produced and reproduced through the interpretation and negotiation of symbolic meanings by individuals. When loneliness is analyzed through the lens of symbolic interactionism, it is not perceived as an objective

condition per se, but rather as a construct emerging from patterns of interaction and subjective interpretations. Loneliness is not necessarily tied to the physical absence of others, but to the meaning an individual attributes to their experience of social disconnection.

In a recent study, Wigfield et al. (2022) offer a reconceptualization of loneliness within an interactionist framework. The authors draw a clear conceptual distinction between "social isolation" and "loneliness," emphasizing that these terms are often conflated in both academic literature and public discourse. They highlight essential differences between the two based on criteria such as subjectivity/objectivity, relationship quality versus quantity, and the discrepancy between desired and actual relational experiences. Their analysis reveals that the relationship between social isolation and loneliness is non-linear; the two may coexist, operate independently, or influence one another in complex ways.

Crucially, the article proposes a novel conceptual model centered on the notion of *meaningful interaction* as a key determinant of relational well-being. The authors argue that it is insufficient to assess only the presence or absence of social contact (i.e., social isolation); instead, the focus must be placed on whether interactions are meaningful to the individuals involved. In this context, symbolic interpretation plays a critical role. For instance, if a person perceives their lack of social interaction as a sign of personal inadequacy or rejection, the experience of loneliness is likely to be intensified. Conversely, an individual who interprets solitude as an opportunity for personal reflection and growth may not associate it with emotional discomfort.

Wigfield et al. (2022) structure their interpretive model around four core "domains" that influence the potential for meaningful interaction:

- **Interaction** – referring to informal or unstructured interpersonal contact. Opportunities for such interactions are essential to subjective well-being.
- **Participation** – involving engagement in organizations, groups, and communal activities. The scope and diversity of one's participation s

### 3.3. The Theory of Sociological Constructivism

The theory of sociological constructivism is grounded in the premise that social reality is actively constructed through human interactions and is not given or objectively predetermined. This perspective, developed by theorists such as Peter L. Berger and Thomas Luckmann, posits that what we perceive as "real" in the social world is the outcome of continuously evolving social and cultural-historical processes. From this standpoint, loneliness is not merely an objective "state" or an inherent fact, but a construct shaped and redefined according to the socio-cultural context in which it unfolds. Like other emotions and experiences, loneliness is a product of the interpretations, norms, and values that structure the environment surrounding the individual.

Stein and Tuval-Mashiach (2015) offer a compelling constructivist analysis of loneliness and propose an integrative model of this experience. The authors argue that defining loneliness has proven difficult due to the complexity and contextual nature of the phenomenon. They critique existing theoretical approaches—such as the cognitive discrepancy model, the fundamental needs approach, and phenomenological frameworks—for being either overly narrow or excessively broad, failing to capture the nuanced essence of loneliness as lived experience.



Adopting a constructivist perspective, they assert that loneliness should be understood as a social construction, which varies significantly across contexts. Their experiential-integrative model identifies seven essential components that collectively constitute the experience of loneliness:

1. **A sense of isolation** – the central element, implying that loneliness always involves some form of actual or perceived disconnection.
2. **A relationship** – isolation occurs within the context of a relational dynamic, whether with others or with the self; loneliness signifies a deficiency within that relationship.
3. **The self experiencing the loneliness** – variables such as isolation sensitivity or personality traits shape how loneliness is felt.
4. **Representation of the other** – the "other" may be a person, a group, or even the self; what matters is the perceived relational significance.
5. **Deficiency in relational needs** – the specific needs that go unmet may include intimacy, understanding, belonging, and others.
6. **A sense of discrepancy** – arises between the current relational reality and the ideal, as defined by unmet needs.
7. **Psychological pain** – results from the convergence of the above elements, defining the experience as one of loneliness.

Stein and Tuval-Mashiach (2015) discuss how their model may be applied in qualitative research to identify loneliness in narratives and in clinical settings to better understand and address it. While acknowledging that the model is rooted in Western cultural traditions, they suggest that future research should examine whether these components are relevant across different cultures.

In a society that highly values interconnectivity and social networking, loneliness may be interpreted as a failure or as a social anomaly, signaling an individual's inability to integrate or maintain social ties. Conversely, in cultures that prioritize introspection and individual withdrawal, loneliness may be reframed as an opportunity for reflection and personal growth.

Furthermore, the way loneliness is constructed in public discourse directly influences how it is perceived and experienced by individuals. As will be explored in the next section on critical theory, dominant narratives that frame loneliness as a growing public health issue or a form of "epidemic" may predispose people to interpret all forms of solitude as pathological or problematic.

A core tenet of sociological constructivism is the acknowledgment of individual agency in the construction of reality. While society offers interpretative frameworks for understanding loneliness, individuals also possess the capacity to negotiate, reinterpret, and actively construct their own meanings and realities. Thus, loneliness is not merely a passive outcome of social forces but may also represent a personal choice or a re-signified experience.

From a constructivist perspective, loneliness is a socio-cultural construction shaped by contexts, discourses, and interactions, as well as by individual-level factors. It is not a monolithic or static experience but a fluid and evolving phenomenon continuously reshaped by the dynamic interplay between society and individual interpretation.

### 3.4. Critical Theory

Critical theory, rooted in the Frankfurt School and shaped by thinkers such as Max Horkheimer, Theodor Adorno, and Jürgen Habermas, is committed to a reflexive analysis of society and the power structures embedded within it. This approach holds that

modern societies and their institutions are characterized by inherent inequalities, and that the role of the researcher is to critique and expose these dysfunctions.

When loneliness is examined through the lens of critical theory, it is not merely understood as a consequence of social dynamics, but as a manifestation of structural power imbalances and systemic inequalities. Loneliness may be interpreted as a product of societal frameworks that prioritize individualism, consumption, and alienation at the expense of community, solidarity, and authentic human connection. In advanced capitalist societies, for example, relational life is increasingly subjected to market logics. Human relationships become transactional, while values such as authenticity and communal belonging are frequently marginalized in favor of competition and performance. This dynamic fosters forms of isolation and loneliness that are deeply rooted in socio-economic structures.

Critical theory also underscores the role of the media in shaping collective narratives about loneliness. The media's function extends beyond the mere dissemination of information; it actively constructs social attitudes and representations in relation to what is perceived as objective reality. In this sense, media discourses contribute to framing loneliness either as an individual pathology or as a social problem, depending on prevailing ideological and institutional agendas.

In 2021, a content analysis was conducted to investigate how loneliness was portrayed in Romanian online print media at that time. This inquiry was grounded in the assumption that no social issue escapes the attention of the media. Therefore, if loneliness is to be acknowledged as a genuine social problem, it logically follows that it should also be addressed within the media space. However, it is important to recognize that media logic differs significantly from scientific inquiry, just as common-sense reasoning often diverges from explanatory models grounded in academic research.

The central research question guiding this investigation was: *How is loneliness represented in Romanian online print media?* The study aimed to explore the portrayal of loneliness as both a social and psychological issue in Romanian digital journalism. Two primary objectives were formulated: first, to identify the general tone or attitude (positive or negative) adopted by the media when reporting on loneliness; second, to determine the variables most commonly associated with loneliness in media discourse.

With respect to hypotheses, the study presumed that loneliness is most frequently correlated with old age in Romanian online media. Additionally, it was hypothesized that the predominant form of loneliness presented is *negative loneliness*, in accordance with Zimmermann's (1785) typology, as well as *emotional loneliness* as classified by Weiss (1973).

Given the relatively small number of online sources consulted for this investigation, the hypotheses were deliberately formulated in descriptive terms—as plausible, provisional expectations—rather than as conjectural statements regarding causal or correlational relationships between variables. This methodological choice reflects a conscious effort to avoid overgeneralization and stems directly from the primary limitation of the research: its quasi-quantitative nature. As such, the findings cannot be extrapolated beyond the immediate sample and do not exhaust the broader topic of how loneliness is addressed within media discourses.

The method employed in this research is **content analysis**. The unit of analysis consists of individual online articles published by media outlets, regardless of whether these outlets also have a printed edition. The research corpus comprises a total of 50 articles, which were identified using the Google search engine by querying the keyword "*singurătate*" (loneliness). Two selection criteria were applied: **recency** (the most recently published results) and **popularity** (those articles that appeared among the most

frequently accessed).

### **Research Findings:**

#### **1) Dominant media attitude toward loneliness:**

The attitude conveyed by the Romanian online press toward loneliness is overwhelmingly negative. Discourse analysis revealed a frequent co-occurrence of terms such as “*depression*”, “*despair*”, “*isolation*”, and “*(need for) support*” within the same textual context as mentions of loneliness. This reflects an underlying framing of loneliness as inherently problematic and distressing.

#### **2) Main variables correlated with loneliness in media discourse:**

- **Loneliness among the elderly:**

No fewer than 21 of the 50 analyzed articles explicitly link the phenomenon of loneliness to older adults. These articles tacitly assume that loneliness is a problem faced almost exclusively by the elderly. Within this category, several subtypes of articles emerge. Some fall under the genre of popular science, offering simplified summaries of academic studies on elderly loneliness or highlighting policy interventions aimed at addressing this issue. Others are dedicated to promoting specific support campaigns targeting older people. Finally, a third group comprises awareness-raising articles, intended to sensitize the general public to the emotional and social isolation experienced by the elderly.

- **Loneliness among celebrities:**

Surprisingly, a significant number of articles focus on a particular subtype of loneliness: that of public figures. While this theme is periodically revisited in media narratives, it gained heightened attention following the sudden death of journalist Cristina Țopescu, who was found deceased in her home after a neighbor alerted the police, noting that she had not been seen for three weeks. Another widely discussed example is that of television personality Andreea Raicu, who publicly disclosed her experience of depression, explicitly linked to a profound sense of loneliness. With the exception of Cristina Țopescu—whose case is more accurately described as social isolation, given the lack of personal testimony about her subjective experience of loneliness—the celebrities who have spoken out confirm one of the explanatory models discussed in this study. Despite being embedded in extensive social networks and occupying highly connected public roles, many public figures experience a dysfunctional form of loneliness, highlighting the complex and non-linear relationship between social visibility and emotional well-being.

- **Loneliness during the COVID-19 pandemic:**

A third major thematic cluster comprises articles that link loneliness to the pandemic context, emphasizing the role of prolonged social isolation in exacerbating subjective experiences of solitude. These articles include editorials, interviews with psychologists, and summaries of recent studies on mental health. Of the 50 articles analyzed, 11 focus explicitly on loneliness in relation to the pandemic and its psychosocial consequences.

#### **3) First research hypothesis: *Loneliness is most frequently associated with old age* — Fully confirmed.**

As noted earlier, the majority of references to loneliness as a social problem in the analyzed media sample pertain to the situation of elderly individuals. The press predominantly constructs loneliness as a condition affecting this age group.

#### **4) Second research hypothesis: *The predominant type of loneliness in online media is negative loneliness* — Fully confirmed.**

Only 2 out of the 50 articles interpret loneliness in a positive light—one referring to the solitude fostered by reading, and the other to the spiritual solitude experienced in prayer. All the remaining 48 articles treat loneliness solely in pathological, individual, or social terms. As such, loneliness is implicitly and consistently defined in journalistic discourse as a mental health or social disorder, with no space allotted to potential alternative, enriching interpretations of the experience.

**5) Third research hypothesis: *The predominant type of loneliness in online media is emotional loneliness* — Partially confirmed.**

This hypothesis receives only partial confirmation due to the **ambiguous nature of journalistic language**, which rarely differentiates clearly between emotional loneliness, social loneliness, and social isolation. Indicators typically associated with emotional loneliness are often blended with those of other conceptual categories, making it difficult to apply precise operational definitions. Nevertheless, in the majority of cases (36 out of 50), media articles emphasize the **emotional aspects** of loneliness—such as pain, suffering, and existential emptiness—suggesting an implicit focus on emotional loneliness, even if not always explicitly named or theoretically distinguished.

In conclusion, the research has demonstrated that **loneliness is a complex and multidimensional concept**, clearly distinct from social isolation. While social isolation refers to the *objective absence of social relationships*, the degree of loneliness is determined by *individual relational standards*—that is, by how one subjectively evaluates the quality and adequacy of their social bonds.

Loneliness may take various forms: it can be **emotional or social**, and it can have either a **positive** or **negative** valence. However, the study found that **negative loneliness predominates in media discourse**. In the majority of the articles analyzed, loneliness is framed as a severe **social and psychological pathology**. Conceptual nuance and differentiation between types of loneliness—such as between emotional and social loneliness, or between transient and chronic forms—do not constitute a priority within journalistic treatment of the subject.

The **main variables** associated with loneliness in the media sample include:

- **Old age**, which is often implicitly portrayed as the default context for experiencing loneliness,
- **Public figures**, whose loneliness is highlighted in contrast to their social visibility, and
- **The COVID-19 pandemic**, which is framed as a context that has exacerbated preexisting forms of isolation and emotional vulnerability.

The research undertaken has shown that **loneliness is predominantly represented in Romanian online media as a negative phenomenon**, most often associated with elderly people, celebrities, and the COVID-19 context. The **media narrative tends to treat loneliness as a pathological condition**, often overlooking its conceptual richness and variability.

From the perspective of **critical theory**, this reductive treatment reflects and reinforces **broader structural issues** that give rise to loneliness in the first place—issues such as commodification of relationships, individualism, and erosion of community ties. Addressing these problems, therefore, requires not only **awareness** but also **active social change**. The media could play a crucial role in both processes: by **shaping a more nuanced public discourse on loneliness** and by **stimulating critical reflection** on the social mechanisms that sustain it.

### 3.5. Social Network Theory and Social Capital

Social network theory focuses on the ways in which individuals are interconnected through a web of social ties and how these connections influence behavior, knowledge, and broader social dynamics (Rapoport, Milgram & Granovetter, 2003). Influenced by the work of sociologists such as Mark Granovetter and Stanley Milgram, this theory examines the structure of social relationships and the reciprocal shaping between individual interactions and the larger social structures in which they are embedded.

When addressing the phenomenon of loneliness through the lens of social network theory, it is important to acknowledge that loneliness is not necessarily determined by the number of social ties an individual possesses, but rather by the *quality*, *depth*, and *personal significance* of those connections (Yanguas et al., 2018). An individual may appear to be well-connected in a vast and active social network, yet still experience profound emotional isolation if these relationships are superficial or fail to provide emotional support and a sense of understanding.

Granovetter's influential theory on "the strength of weak ties" highlights the utility of weak, non-intimate relationships in granting access to diverse information and resources (Granovetter, 1973). However, from the standpoint of loneliness, such weak ties may fall short of offering the affective resonance and emotional support that individuals typically seek in their close relationships. In this sense, one may be socially "connected" yet remain existentially alone.

Social network theory also emphasizes the emotional and psychological implications of relational configurations (Borgatti & Ofem, 2010). The overall structure of an individual's social network can shape their emotional well-being, particularly through its influence on their sense of belonging. Individuals who occupy intermediary positions between heterogeneous social groups may enjoy enhanced access to varied information and opportunities, yet may simultaneously experience a diminished sense of social cohesion, heightening feelings of isolation. Sociological analyses suggest that fragmented or loosely bonded social structures increase vulnerability to existential anxieties, such as loneliness.

Beyond individual-level effects, structuralist theories explore how patterns of connectivity across society influence social dynamics at large. For example, being situated at the intersection of multiple, culturally or ideologically disparate social segments can lead to identity uncertainty and intensify experiences of existential isolation.

In summary, from the perspective of social network theory, loneliness emerges as a function not merely of how many relationships one maintains, but more crucially of how deep, emotionally meaningful, and cohesive those relationships are. A comprehensive understanding of loneliness must therefore consider the structure, quality, and significance of interpersonal ties, evaluating not just their existence, but their ability to foster emotional resonance, mutual understanding, and a sense of authentic belonging.

### 4. The Relationship Between Loneliness and Quality of Life

While for some individuals loneliness may represent a deliberate choice and even serve as a catalyst for introspection and personal growth, for others it signals an acute deficiency in meaningful human connections. The concept of quality of life, broadly defined as encompassing subjective assessments of an individual's physical, mental, and social well-being (Șirbu et al., 2012), is inherently intertwined with the phenomenon of loneliness in several key ways:

**The impact of loneliness on physical health** is one of the most significant avenues through which it diminishes quality of life. Loneliness has been shown to

contribute to heightened levels of stress, systemic inflammation, and elevated blood pressure—all of which are known to increase the risk of chronic illness and to reduce life expectancy. In a comprehensive study by Philip et al. (2020), it was found that individuals experiencing chronic loneliness face a significantly increased risk of cardiovascular disease, strokes, and even premature death when compared to individuals embedded in close social relationships.

Several mechanisms account for these negative health outcomes associated with loneliness. First, the researchers argue that loneliness is strongly correlated with unhealthy lifestyle choices. People who live in loneliness are more likely to exhibit poor dietary habits, including high consumption of processed foods and saturated fats. Furthermore, they are generally less physically active and tend to suffer from poorer sleep quality.

Second, loneliness contributes to chronic stress. The absence of supportive social relationships triggers the body's stress response system, increasing the secretion of stress hormones such as cortisol. Long-term exposure to elevated cortisol levels not only harms cardiovascular health but is also linked to an increased risk of developing depressive symptoms. Moreover, chronic stress has a suppressive effect on the immune system, rendering lonely individuals more vulnerable to infections and diseases.

In sum, from a psychosocial and biomedical perspective, loneliness acts as a powerful determinant that undermines both the subjective and objective dimensions of quality of life. Its consequences extend far beyond emotional discomfort, manifesting in tangible deteriorations of physical health, which in turn reinforce cycles of isolation and psychological distress. Understanding and addressing this relationship is crucial for developing effective public health interventions aimed at improving both individual well-being and broader societal resilience.

### **The Relationship Between Loneliness and Mental Health:**

There is robust scientific evidence supporting the association between loneliness and a wide range of mental health disorders, such as depression, anxiety, and cognitive decline. When individuals experience persistent feelings of isolation or lack of meaningful social connection, their emotional and cognitive functioning tends to deteriorate, directly impacting their overall quality of life.

A study conducted by Wang et al. (2020) explored the relationship between loneliness and mental health, with a particular focus on the mediating role of social support, using a sample of adults in the Netherlands. According to the evolutionary theory of loneliness, the lack of social connectedness has long-term consequences for both mental and physical health. Social support is posited as a key mechanism through which loneliness affects psychological well-being.

The study's findings indicated that social support partially mediates the relationship between loneliness and various psychological conditions, including anxiety, depression, and somatic symptoms. This suggests that while loneliness exerts a direct negative influence, the presence of social support can attenuate some of its harmful effects on mental health. However, the study also found that the relationship between loneliness and a clinical diagnosis of somatic symptom disorder was not mediated by social support, indicating that certain forms of psychopathology may follow more complex pathways.

Overall, the research offers strong evidence that loneliness has deleterious effects on mental health, and that social support can partially buffer against its impact—particularly in relation to symptoms of anxiety, depression, and general somatic complaints. These findings underscore the essential role that social connectedness plays in preserving and enhancing mental well-being.

### **The Relationship Between Loneliness and Socioeconomic Status:**

Another important dimension is the intersection between loneliness and socioeconomic conditions, particularly in later life. A study by Szabo et al. (2019) investigated how housing status (ownership vs. renting) influences quality of life among elderly individuals, and how this relationship is moderated by both loneliness and socioeconomic status.

The findings revealed that emotional loneliness exerts a significant negative impact on key dimensions of quality of life in old age, including perceived control, autonomy, and enjoyment of life. However, these negative effects were found to be less pronounced among homeowners than among renters. In other words, owning one's residence appears to buffer against the detrimental emotional effects of loneliness.

Moreover, the status of homeownership also moderated the relationship between socioeconomic status and quality of life: the beneficial effects of higher socioeconomic status on control and autonomy were amplified for individuals who owned their homes. This suggests that elderly homeowners are better positioned to leverage their financial and material resources to sustain or enhance their quality of life.

One of the study's most salient conclusions is that homeownership may function as a protective factor against the impact of emotional loneliness in later life. It appears to provide not only a form of material stability but also psychosocial resilience, by reinforcing feelings of security, autonomy, and social integration.

Another relevant study, conducted by Tapia-Muñoz et al. (2022), investigates the relationship between income inequality and the prevalence of loneliness among older adults in the United States and 16 European countries. This research is particularly significant because it focuses on the macro-level determinants of loneliness—a dimension that has remained relatively underexplored in prior sociological and public health literature.

The study highlights that loneliness is more prevalent among older adults, and its occurrence varies considerably across national contexts. These variations are influenced by country-specific socioeconomic, psychosocial, and health-related factors. One of the central hypotheses advanced by the researchers is that income inequality, by shaping material conditions and producing relative social deprivation, is positively associated with loneliness.

This hypothesis is grounded in previous findings that have linked higher levels of income inequality with increased experiences of loneliness, particularly in European countries. To empirically test this relationship, the authors utilized cross-sectional secondary data drawn from three large-scale, representative datasets: the Health and Retirement Study (HRS) in the United States, the English Longitudinal Study of Ageing (ELSA), and the Survey of Health, Ageing and Retirement in Europe (SHARE). Together, these databases encompassed responses from 75,891 adults aged 50 and older.

The results revealed substantial variation in the prevalence of loneliness across countries: 25.32% in the U.S., 17.55% in England, and a range of 5.12% to 20.15% across the European countries studied. A statistically significant positive correlation was identified between higher levels of income inequality and an increased probability of experiencing loneliness among older adults—even after controlling for sociodemographic variables and GDP per capita.

The discussion section of the study emphasizes that national-level income inequality is independently associated with higher loneliness prevalence, beyond what can be explained by individual-level sociodemographic factors. This suggests that broader structural inequalities shape the social and emotional lives of older individuals, potentially exacerbating feelings of disconnection and marginalization.

Recognizing the profound impact of loneliness on quality of life, a growing number of programs and interventions have been developed globally. These initiatives seek to enhance social connectedness, foster psychological resilience, and provide targeted resources for individuals experiencing loneliness.

Ultimately, the study supports the view that loneliness and quality of life are intimately linked, with each profoundly shaping individuals' lived experiences and subjective well-being. Addressing loneliness, therefore, requires not only interpersonal support but also structural solutions that reduce inequality and promote inclusive, connected communities.

## 5. Conclusions

At the end of this analytical undertaking, what ultimately proves to be most relevant is not merely a theoretical taxonomy of loneliness, but rather an understanding of the *tension* that underlies every attempt to define it univocally. Loneliness persistently eludes conceptual fixation: it is simultaneously *effect and cause, symptom and choice, a sign of relational deficiency and a possibility for inner reconstruction*.

From the standpoint of the theories discussed, there is no full convergence—but it is precisely this plurality that allows for the shaping of a complex interpretative topography. While structural functionalism regards loneliness as an indicator of fractured integrative mechanisms, and social network theories locate it within the logic of absent or weak ties, interpretive and critical paradigms grant the phenomenon a symbolic and reflexive depth, whereby the experience of loneliness is always mediated by the cultural and emotional frameworks of a given era.

Interestingly, regardless of the chosen angle of analysis, loneliness seems to be always something *other* than what it appears: it never fully overlaps with isolation, it is not exhausted by the mere absence of relationships, and it cannot be captured entirely by psychology, sociology, or philosophy. It may, in fact, be one of those *limit concepts* that reveal—rather than explain—a rupture in our way of thinking the relationship between the individual and the world.

In this light, the contribution of the present article lies less in the offering of a unifying model and more in the articulation of a *layered interpretive grid*, which allows the phenomenon to be simultaneously understood as an affective experience, as a product of social arrangements, and as a cultural symptom. Efforts have been made to avoid reifying the concept and to preserve its semantic mobility—precisely because this mobility seems to be one of its defining characteristics.

Above all, however, the prevailing conclusion is an epistemological one: loneliness cannot be fully understood without an *interpretive ecology* that connects seemingly heterogeneous levels—ranging from observable social networks to internalized relational standards, from dominant narrative forms to the silent dissonances of subjective experience. Only in this way, between structural objectivity and lived subjectivity, can an *interstitial space* emerge in which understanding becomes possible—and perhaps even transformative.

In seeking to transcend the limitations of existing models—each operating with its own set of variables, hypotheses, and epistemic frameworks—we propose an *integrative theoretical model* that conceives of loneliness not as a fixed entity, but as an *emergent phenomenon* arising from a dynamic relational ecosystem, in which *objective factors, subjective processes, symbolic constructions, and institutional structures* simultaneously interact. This model—here called the *relational ecology of loneliness*—is based on the premise that any experience of loneliness results from an imbalance among four fundamental registers: actual social ties, mental representations of connectedness,



the symbolic frameworks of the era, and the institutional organization of society.

Unlike previous models that treat loneliness either as an individual problem or as a by-product of social disintegration, this model considers it a stratified relational phenomenology—an ecological imbalance among interdependent layers of reality. Thus, loneliness does not arise merely because “we have no one to talk to” or “we don’t know how to relate,” but rather from a fracture-space—a tension between what we experience, what we understand, what we are told, and what we are allowed—that takes the shape of lived loneliness.

The **first level** of this ecosystem is the concrete relational network—the set of observable, quantifiable social ties that reflect an individual’s position within a structure. Here, insights from social network theories prove essential: it is not the number of connections that matters most, but their cohesion, emotional proximity, and functional relevance. An individual may have dozens of contacts and still lack any connection that supports a sense of belonging. At the same time, their network position—whether as a marginal node or as an isolated broker between desirable clusters—can indirectly shape access to support, validation, and meaning.

The **second level** is the cognitive-affective one, where relationships are internalized through mechanisms of interpretation, comparison, and emotional evaluation. Here, the cognitive discrepancy model proposed by Perlman and Peplau becomes indispensable. Loneliness arises not so much from a lack of relationships as from the gap between what we have and what we believe we should have—between our actual social network and the ideal one. Relational standards are not neutral or universal; they are filtered through personal history, attachment style, trauma, aspirations, and cultural conditioning. In this light, loneliness is not a mere lack of company, but a crisis of congruence between expectations and reality, between the need for relational meaning and the absence of a network that fulfills it.

The **third layer** is the symbolic-discursive level, where the meaning of loneliness is shaped by collective language, social imaginaries, and dominant narratives. Here, interactionist and constructivist models converge productively. An experience of solitude that may be valorized in one cultural context (e.g., monastic withdrawal, meditation, contemplation) may be stigmatized, medicalized, or marginalized in another. The media plays a decisive role in constructing a collective understanding of loneliness—whether as a sign of personal failure or a social symptom. Thus, an individual’s experience is contaminated by social discourses that either enable or deny a framework of meaning. In this sense, loneliness is also a *narrative construct*—a way of feeling and speaking about absence within the language accepted by a particular era.

Finally, our model adds a **fourth essential level**, inspired by critical theory: the structural-institutional level, which includes public policies, implicit norms of coexistence, the social design of time and space, and normative expectations regarding relational life. Here, loneliness emerges not as an anomaly but as a systemic effect of contemporary social organization. Urban atomization, neoliberal individualism, the logic of performance, and the erosion of leisure time all converge to make sustained, unconditional relationships increasingly difficult to maintain. In this context, even those capable of relational engagement discover that the *social infrastructure of connection* is either dismantled or transformed into a transactional space. Loneliness, therefore, is no longer just a state—it becomes a political consequence.

Through this integrative approach, the *relational ecology model of loneliness* does not offer a linear or monocausal explanation, but instead proposes a stratified framework in which loneliness becomes an indicator of dysfunctional interaction between networks, meanings, lived experiences, and structures. More than an individual symptom or a social

pathology, loneliness becomes a *barometer of contemporary fragmentation*, a critical space of inquiry where the fissures between who we are, what we desire, what is allowed, and what is still possible are laid bare.

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# The Impact of Motivation on Job Satisfaction Levels Among IT Technicians

**Mihaela Luminița SANDU**

Lecturer Ph.D. Ovidius University of Constanta (Romania),

Email: mihaela.sandu@365.univ-ovidius.ro

**Maria PESCARU**

Associate Professor Ph.D. National University of Science and Technology Politehnica

Bucharest, Pitesti University Center (Romania)

Email: maria.pescaru@upb.ro

**Abstract:** *Motivation plays a crucial role in shaping job satisfaction, engagement, and overall employee performance, particularly in dynamic fields such as information technology. Given the high demands of continuous learning, adaptability, and resilience in this sector, understanding how motivation influences job satisfaction is essential for optimizing workplace well-being and productivity. Objectives and Hypotheses: This study aims to examine the impact of motivation on job satisfaction among IT technicians. Three main hypotheses guide the research: there is a positive correlation between motivation and job satisfaction, motivation is positively associated with self-esteem, and employees with more than five years of experience display higher motivation levels compared to those with less experience. Methodology: The study was conducted on a sample of 60 IT technicians from two companies, utilizing validated psychological scales, including the Multidimensional Work Motivation Scale, the Work-related Basic Need Satisfaction Scale, and the State Self-Esteem Scale. Statistical analyses included correlation tests and independent samples t-tests. Results: Findings indicate a moderate positive correlation ( $r = 0.427$ ,  $p < 0.05$ ) between motivation and job satisfaction, confirming that increased motivation enhances job satisfaction. Additionally, motivation is correlated with self-esteem ( $r = 0.373$ ,  $p < 0.05$ ), and employees with more extensive experience exhibit significantly higher motivation levels ( $p < 0.05$ ). Conclusions: The results highlight the importance of fostering motivation to enhance job satisfaction and overall workplace engagement. Organizations should implement strategies that promote both intrinsic and extrinsic motivation, professional growth, and recognition to improve individual well-being and organizational performance.*

**Keywords:** *motivation; job satisfaction; self-esteem; IT technician; research; statistics.*

## 1. Introduction

In the dynamic field of organizational psychology, understanding the intricate interplay between motivation, job satisfaction, and self-esteem is fundamental to creating productive, engaging, and fulfilling work environments. These psychological factors not only shape individual performance but also influence overall organizational effectiveness, employee retention, and workplace culture.

Motivation, driven by both intrinsic factors (such as personal growth and sense of purpose) and extrinsic factors (such as financial incentives and recognition), serves as a key determinant of employee behavior and performance. A well-motivated workforce exhibits higher levels of engagement, perseverance, and efficiency, contributing to both individual and collective success.

Job satisfaction, closely linked to job characteristics such as autonomy, workload, and career development opportunities, plays a significant role in shaping employees' motivation and commitment. A satisfying work environment enhances employee morale, reduces turnover rates, and fosters long-term dedication to organizational goals.

Likewise, self-esteem—defined by individuals' perceptions of their capabilities—impacts their confidence, resilience, and ability to innovate within the workplace. Employees with high self-esteem are more likely to embrace challenges, adapt to change, and make creative contributions to organizational progress. Conversely, low self-esteem may lead to decreased motivation, lower performance, and resistance to new opportunities.

By comprehensively understanding these psychological dimensions, organizations can develop effective strategies that enhance motivation, improve job satisfaction, and foster self-esteem. This holistic approach leads to a thriving and engaged workforce, ultimately supporting both employee well-being and long-term organizational success.

## **2. Theoretical Frameworks for Understanding Motivation, Job Satisfaction, and Self-Esteem in Organizational Settings**

The study of motivation, job satisfaction, and self-esteem within organizational contexts is deeply rooted in various psychological theories that provide valuable insights into employee behavior and workplace dynamics. Understanding these theoretical frameworks is crucial for developing strategies that enhance motivation, promote job satisfaction, and foster a positive self-concept among employees.

One of the most influential theories in motivation research is Maslow's Hierarchy of Needs Theory (1943: 370), which proposes a hierarchical model of human needs ranging from physiological necessities to self-actualization. Maslow suggests that individuals progress through five levels of needs—physiological, safety, belongingness, esteem, and self-actualization—with each level requiring fulfillment before higher-level needs become salient. In an organizational setting, this theory underscores the importance of providing employees with not only basic financial security but also opportunities for social connection, recognition, and personal growth. Satisfaction of these needs contributes to increased motivation and well-being, ultimately fostering a more engaged and committed workforce (Maslow, 1943: 370-396).

Self-Determination Theory (SDT), developed by Deci and Ryan (2013: 416-436), expands upon intrinsic and extrinsic motivation by emphasizing the role of three innate psychological needs: autonomy, competence, and relatedness. According to SDT, when these needs are met, individuals experience greater job satisfaction, engagement, and overall well-being. In an organizational context, providing employees with autonomy in decision-making, opportunities to develop their skills, and a supportive social environment enhances intrinsic motivation, leading to higher performance and job commitment (Deci and Ryan, 2013: 39-80).

A complementary perspective is provided by Cognitive Evaluation Theory (CET), an extension of SDT, which examines the interaction between intrinsic and extrinsic motivators in shaping an individual's perception of competence and autonomy. Deci and Ryan (1980: 39-80) argue that external rewards, such as financial incentives or performance-based recognition, can either enhance or undermine intrinsic motivation, depending on how they affect an individual's sense of autonomy and self-efficacy. When rewards are perceived as controlling, they may diminish intrinsic motivation by reducing an individual's sense of personal agency. Conversely, when rewards provide informational feedback that enhances a sense of competence, they can reinforce inherent motivation and engagement in work-related tasks (Deci & Ryan, 1980, pp. 39-80).

These theoretical models collectively provide a comprehensive understanding of the mechanisms underlying motivation, job satisfaction, and self-esteem in the workplace. By integrating these frameworks, organizations can develop evidence-based

strategies to foster a work environment that supports employee well-being, encourages engagement, and promotes long-term organizational success.

### **3. The Role of Motivation in Employee Engagement, Productivity, and Job Satisfaction**

Motivation is a fundamental driver of individual actions and behaviors in the workplace, shaping employee engagement, productivity, and overall job satisfaction. It serves as a key determinant of performance and organizational commitment, influencing both short-term efficiency and long-term success.

Workplace motivation is generally categorized into two primary types: **intrinsic and extrinsic motivation**. Intrinsic motivation originates from an individual's internal desires, such as personal interest, passion for the work, or the pursuit of mastery. In contrast, extrinsic motivation is influenced by external factors, such as financial incentives, promotions, or recognition (Deci & Ryan, 2000, pp. 227-268). Studies indicate that while extrinsic rewards can effectively enhance motivation in the short term, intrinsic motivation tends to be more sustainable and is associated with higher levels of job satisfaction and long-term performance (Deci, Koestner, & Ryan, 1999, p. 627).

Various organizational factors contribute to employee motivation, including recognition and rewards, goal-setting, and job design. For instance, jobs that provide autonomy, opportunities for skill development, and constructive feedback are more likely to foster intrinsic motivation and enhance job satisfaction. Employees who experience greater independence and engagement in their tasks are more likely to develop a more substantial commitment to their organization and demonstrate higher levels of productivity (Judge & Bono, 2001, pp. 80-92).

Ultimately, motivation plays a critical role in shaping employee performance, job satisfaction, and organizational loyalty. Organizations that prioritize motivational strategies—balancing both intrinsic and extrinsic incentives—can foster a more engaged workforce, ultimately leading to enhanced competitiveness and long-term market success.

### **4. Job Satisfaction: A Key Determinant of Employee Well-Being and Organizational Success**

Job satisfaction refers to the degree to which employees feel fulfilled, valued, and content in their roles, playing a crucial role in shaping workplace motivation, performance, and overall employee well-being. It directly influences employees' attitudes, behaviors, and levels of engagement, ultimately affecting organizational productivity, commitment, and retention.

Research consistently demonstrates that job satisfaction is strongly linked to employee engagement and performance. Satisfied employees tend to be more committed to their work, demonstrate higher levels of productivity, and are less likely to leave the organization. Furthermore, job satisfaction has a profound impact on mental health and overall life satisfaction, underscoring its importance beyond the professional environment (Judge et al., 2001, pp. 376–407).

Several factors contribute to job satisfaction, including job-related aspects such as autonomy, career advancement opportunities, and meaningful work, as well as individual factors such as personality traits, intrinsic motivation, and alignment with personal values. Additionally, a supportive organizational culture, characterized by effective leadership, transparent communication, and a positive work environment, significantly enhances employees' overall job satisfaction (Schneider et al., 1998, pp. 474-490).

A high level of job satisfaction benefits not only employees but also organizations. Companies that prioritize job satisfaction experience increased employee engagement,

lower turnover rates, and improved overall organizational performance. Moreover, fostering a culture that values employee well-being enhances innovation and long-term business success. Organizations that prioritize creating a fulfilling work environment can gain a competitive edge by attracting and retaining top talent, while fostering a culture of continuous growth and innovation.

### **5. Self-Esteem in the Workplace: Its Role in Employee Well-Being and Performance**

Self-esteem, defined as an individual's subjective evaluation of their worth and abilities, plays a critical role in shaping attitudes, behaviors, and performance in the workplace. A thorough understanding of its dynamics is crucial for creating supportive work environments that promote employee well-being, motivation, and overall productivity.

As the foundation of individuals' beliefs about themselves, self-esteem influences thoughts, emotions, and behaviors across various domains, including professional settings. Employees with high self-esteem are more likely to exhibit proactive behavior, embrace challenges, and demonstrate persistence in overcoming obstacles—key factors contributing to personal and professional success (Judge and Bono, 2001: 80-92). Conversely, low self-esteem can lead to self-doubt, reluctance to take initiative, and a decreased ability to cope with workplace stressors, which can potentially hinder both individual and organizational performance.

Research consistently highlights the strong correlation between self-esteem, job satisfaction, and work performance. Employees with higher self-esteem tend to experience greater job satisfaction, exhibit higher engagement, and demonstrate greater resilience in the face of adversity. Self-esteem serves as a psychological buffer against workplace stress and negative feedback, enabling employees to maintain their motivation and well-being despite challenges (Luthans et al., 2007, pp. 541-572). Furthermore, individuals with high self-esteem are more likely to take initiative and contribute to innovation, enhancing overall organizational effectiveness.

Organizations can actively foster employee self-esteem by implementing strategies that promote a positive and empowering work environment. Key approaches include offering opportunities for skill development, creating a culture of recognition and appreciation, and encouraging supportive workplace relationships. Leadership styles that emphasize encouragement, constructive feedback, and employee empowerment significantly contribute to higher self-esteem levels among employees. By investing in these strategies, organizations can enhance motivation, job satisfaction, and resilience, ultimately improving both individual performance and broader organizational outcomes.

### **6. Research methodology**

To achieve a comprehensive understanding of the influence of motivation on the quality of service provided by employees in the workplace, we pursued the following objectives:

1. Identifying a positive correlation between the level of motivation and job satisfaction.
2. Identifying a positive correlation between the level of motivation and self-esteem.
3. Identifying a significant difference between employees with more than 5 years of experience and those with less experience in terms of motivation level.

The hypotheses constructed for this study aim to address the aspects presented in the theory and provide answers to the research questions posed earlier.

1. It is presumed that there is a correlation between the level of motivation and job satisfaction.

2. It is presumed that there is a correlation between the level of motivation and self-esteem.

3. It is presumed that there are differences in motivation levels between employees with more than 5 years of experience and those with less experience.

The sample chosen for our research consists of 60 subjects, 39 males and 21 females, aged between 21 and 33 years old. All subjects hold the position of IT technician in two companies, with 33 subjects having more than 5 years of experience in this field.

To test the hypotheses, we selected a battery of tests that will support our evaluation of the subjects.

- The Multidimensional Work Motivation Scale (MWMS) - 19 items - Adapted to the Romanian population by Coralia Sulea (<https://www.researchcentral.ro/detalii.php?id=440>).

- Work-related Basic Need Satisfaction Scale - 18 items - Adapted to the Romanian population by Busuioc Andrada Cristiana (<https://www.researchcentral.ro/detalii.php?id=603>).

- The State Self-Esteem Scale - 20 items - Adapted to the Romanian population by Avramescu Răzvan, Ana Maria Oțel, Turtoi Vlad Mosoni, Antonia Mara Diaconiță, Daniel Florea, Cristina Pavel (<https://www.researchcentral.ro/detalii.php?id=405>).

## 7. Analysis and Interpretation of Results

**Hypothesis 1:** It is presumed that there is a correlation between the level of motivation and job satisfaction.

**Table 1. Results of the motivation-job satisfaction correlation**

Correlations		motivatio n	Satisfactie la locul de munca
Motivation	Pearson Correlation	1	.427*
	Sig. (2-tailed)		.00
	N	60	60
Job satisfaction	Pearson Correlation	.427*	1
	Sig. (2-tailed)	.00	
	N	60	60

Analyzing the results of the correlation between motivation and job satisfaction, the Pearson coefficient obtained is 0.427, indicating a moderate positive correlation between the two variables. This result suggests that as employee motivation levels increase, there is a corresponding trend toward growth in job satisfaction.

Statistically, the significance level ( $p = 0.00$ ) indicates that this relationship is highly significant at a 95% confidence level, meaning that the probability of this correlation being random is extremely low. In addition, the number of participants analyzed ( $N = 60$ ) provides a solid basis for interpreting these results, thereby increasing their validity.

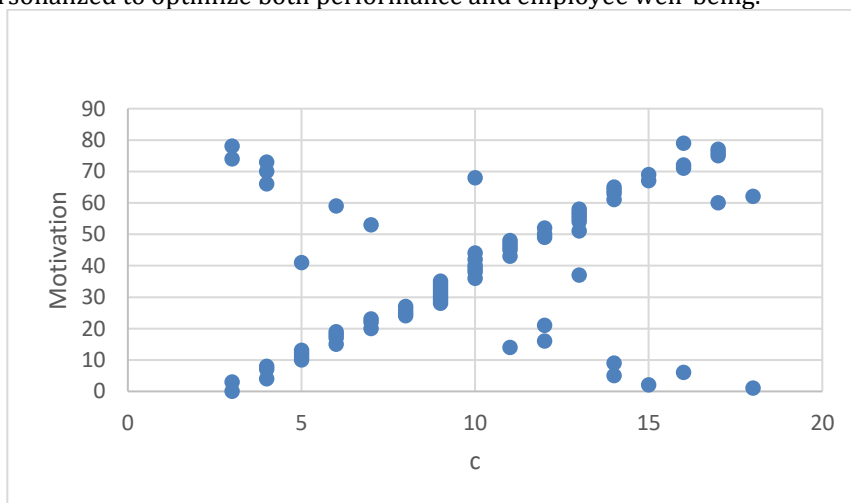
Psychologically, this moderate correlation suggests that motivation plays a significant role in determining job satisfaction, but it is not the sole influential factor. Motivation, whether intrinsic (a desire for personal growth or passion for work) or



extrinsic (financial rewards or social recognition), contributes to the feeling of professional fulfillment. Employees who feel motivated tend to be more engaged in their activities, perceive their work as more fulfilling, and exhibit a more positive attitude towards the organization.

However, the fact that this correlation is only moderate suggests that other factors, such as working conditions, relationships with colleagues and superiors, organizational culture, autonomy in decision-making, and opportunities for advancement, also influence job satisfaction. Thus, to improve employee satisfaction, organizations should not only focus on increasing motivation but adopt a holistic approach, taking into account several dimensions of the work experience.

In conclusion, the results obtained confirm that motivation and job satisfaction are interconnected but not synonymous, and organizational strategies must be complex and personalized to optimize both performance and employee well-being.



**Figure 1. Scatterplot- the correlation between motivation and job satisfaction**

By analyzing the obtained data, we can derive significant conclusions regarding the impact of motivation on employees' workplace experience.

Firstly, the p-values of the Kolmogorov-Smirnov coefficient (Sig.) for both motivation and job satisfaction are more significant than 0.05, indicating that the distributions of these variables align with the assumption of normality. This result is critical for statistical analysis as it justifies the use of parametric tests to examine the relationship between motivation and job satisfaction, increasing the reliability of the findings.

Secondly, examining the Pearson correlation coefficient, we observe a value of 0.427, suggesting a moderate positive correlation between motivation and job satisfaction. Since this coefficient is significantly different from zero and closer to 1, it indicates that employees with higher levels of motivation tend to report greater job satisfaction. This statistically significant relationship highlights a crucial dynamic in the workplace, emphasizing that motivation is a significant predictor of employees' overall job satisfaction.

From the perspective of human resource management and organizational psychology, this finding carries substantial implications. It suggests that motivated employees are generally more satisfied with their work, which can enhance organizational productivity, employee engagement, and overall well-being. Employees who find meaning

in their tasks and experience motivation—whether through intrinsic rewards (personal growth, recognition) or extrinsic rewards (salary, benefits)—are more likely to demonstrate higher commitment and performance.

The relationship between motivation and job satisfaction is well-documented in the field of psychology. Locke and Latham's Goal-Setting Theory (2019: 93) emphasizes that setting clear, specific, and challenging goals enhances employee motivation, ultimately leading to higher levels of job satisfaction and improved workplace performance. Their research confirms that employees who are motivated by meaningful goals are more likely to feel fulfilled in their professional roles.

Additionally, Herzberg's Two-Factor Theory (2022: 971-978) distinguishes between hygiene factors (e.g., salary, job security, and working conditions) and motivational factors (e.g., recognition, professional growth, and responsibility) in shaping job satisfaction. While hygiene factors help reduce dissatisfaction, authentic employee engagement and job satisfaction are primarily driven by motivational factors. This aligns with the results obtained, reinforcing the idea that organizations should not only ensure proper working conditions but also cultivate an environment that fosters professional growth, autonomy, and recognition.

Based on these theoretical insights, the findings highlight the importance of providing employees with meaningful work, opportunities for professional development, and a supportive organizational culture. These elements are essential in enhancing both motivation and job satisfaction, which in turn contributes to higher employee performance, retention, and overall organizational success.

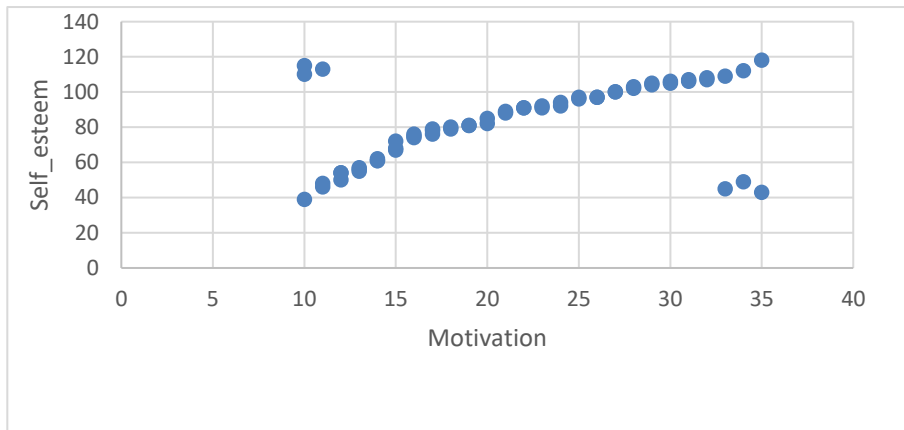
**Hypothesis 2:** It is presumed that there is a correlation between the level of motivation and self-esteem.

**Table 2. Results of the correlation between motivation and self-esteem**

Correlations			
		Self-esteem	motivatio n
Self_esteem	Pearson Correlation	1	.373
	Sig. (2-tailed)		.00
	N	60	60
Motivation	Pearson Correlation	.373	1
	Sig. (2-tailed)	.00	
	N	60	60

Examining the correlation between self-esteem and motivation, the results indicate a Pearson coefficient of 0.373, suggesting a moderate positive correlation between the two variables. This suggests that a higher level of self-esteem is associated with greater motivation in the professional environment; however, the relationship is not particularly strong, indicating that other factors also influence employee motivation.

Statistically, the significance level ( $p = 0.00$ ) indicates that this correlation is highly significant, meaning that the probability that this relationship is due to random variation is extremely low. Additionally, the sample size ( $N = 60$ ) is sufficient to ensure the validity of the results. This aspect lends confidence to the conclusions drawn, emphasizing that self-esteem and motivation are closely connected.



**Figure 2. Scatterplot - correlation between motivation and self-esteem**

From a psychological perspective, this relationship can be explained by the fact that self-esteem influences an individual's perception of their abilities and skills, having a direct impact on how they regulate their behavior about professional goals. Employees with high self-esteem tend to be more confident in their abilities, take on more responsibility, and exhibit stronger intrinsic motivation, which allows them to be more engaged and persevering in the face of challenges. On the other hand, low self-esteem can lead to self-doubt, avoidance of risk-taking, and reduced motivation, thereby affecting both individual performance and job satisfaction.

According to Bandura's (1997: 122) theory of self-efficacy, individuals who have a positive perception of their effectiveness are more motivated to put in effort and achieve their goals. Similarly, the theory of self-determination (Deci and Ryan, 2000: 227-268; Schneider et al., 836) highlights the fact that autonomy, competence, and positive social relationships are essential factors in stimulating intrinsic motivation. Therefore, employees with a high level of self-esteem are more likely to be actively involved in work tasks, seek professional challenges, and maintain their motivation in the long term.

The moderate correlation between these variables suggests that, although self-esteem plays a significant role in professional motivation, it is not the sole determining factor. Contextual elements, such as organizational climate, leadership style, merit-based recognition, and professional development opportunities, can significantly impact employee motivation. Organizations that want to improve the motivation of their teams should adopt strategies that support the development of self-esteem through constructive feedback, recognition of performance, and the creation of a work environment where employees feel valued and competent.

In conclusion, the results obtained confirm that self-esteem and motivation are interconnected, and increasing employees' self-confidence can help improve motivation levels. However, motivation is also influenced by other variables, suggesting the need for an integrated approach that takes into account both individual and organizational factors to maximize performance and job satisfaction.

The statistical analysis presented suggests a link between motivation and self-esteem, an observation that can be profound from a psychological perspective. The initial finding, based on tests of normality (such as Kolmogorov-Smirnov), indicates that the data distributions for motivation and self-esteem follow a normal distribution, allowing for further valid analysis of the correlation between these two variables.

The positive moderate correlation, with a Pearson coefficient of .373, indicates that as a person's level of motivation increases, so does their self-esteem. Motivation and self-esteem are fundamental psychological constructs that influence individual thoughts, feelings, and behaviours. While motivation refers to the force behind goal-oriented behaviour, self-esteem refers to the evaluation of one's own worth and capabilities. Researchers have long been interested in the possible correlation between these constructs, suggesting that increased motivation could lead to improved self-esteem.

The interconnection between motivation and self-esteem is reflected through a series of fundamental psychological and social mechanisms. This connection highlights how positive self-perception and recognition of individual achievements can amplify intrinsic motivation, creating a positive cycle of self-improvement. Thus, self-determination theory emphasizes the importance of fulfilling essential psychological needs - autonomy, competence, and relatedness - to support this dynamism. Additionally, the impact of the external environment and the ability to navigate challenges with strengthened self-esteem are crucial for developing psychological resilience and maintaining motivation.

Research by Deci and Ryan (2000: 227-268) within self-determination theory suggests that intrinsic motivation, characterized by engagement in activities for their intrinsic satisfaction, positively correlates with self-esteem. According to their findings, individuals who pursue goals aligned with their values and interests experience greater feelings of competence and self-worth.

Harter (2015: 87) conducted a longitudinal study with adolescents, revealing a bidirectional relationship between motivation and self-esteem. The results indicated that as motivation increases, so does self-esteem, and vice versa. This reciprocal influence highlights the dynamic nature of the relationship between these constructs over time.

Thus, intrinsic motivation or the desire to achieve personal goals plays an important role in how people perceive themselves and the value they attribute to themselves.

**Hypothesis 3.** It is presumed that there are significant differences in employees' motivation based on their tenure.

**Table 3. Independent Samples Test - motivation and work experience.**

		Independent Samples Test							
		Levene's Test for Equality of Variances		t-test for Equality of Means					
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference Lower Upper
Avoidance	Equal variances assumed	.887	.350	.565	58	.023	.70000	1.23967	-1.78147 3.18147
	Equal variances not assumed			.532	32.712	.011	.70000	1.31572	-1.97775 3.37775

***Interpretation of the t-Test for Independent Samples: The Relationship Between Avoidance and Group Differences***

The results of the Levene test indicate an F value of .887 and a significance level (p) of .350, suggesting that there is no significant difference between the variances of the two groups. Since  $p > .05$ , the hypothesis of equal variances is accepted, which means that we can interpret the results of the t-test for independent samples under this assumption.

Looking at the t-test for equality of means, we see a t-value of .565 with 58 degrees of freedom and a  $p = .023$  (for equal variances). Since this significance level is less than .05, the result suggests that there is a statistically significant difference between the two groups in terms of avoidance. The difference between the group averages is .700, but the 95% confidence interval (-1.78147, 3.18147) shows that this difference can vary over a fairly wide range.

From a psychological perspective, these results suggest that the level of avoidance differs significantly between the two groups analyzed. Avoidance is often associated with passive coping mechanisms, in which individuals try to distance themselves from situations perceived as stressful or threatening. A higher level of avoidance may indicate a stress management strategy based on emotional withdrawal, which can have negative consequences on performance, adaptability, and satisfaction in the work environment.

The significant difference between groups can be explained by contextual or individual factors, such as personality style, perceived stress level, or available social support. According to Luthans and all. (2007: 541-572) theory of coping, individuals who frequently resort to confrontational avoidance may experience higher levels of stress and anxiety, which can lead to decreased motivation and engagement in work tasks.

The results can also have important implications for human resources and organizational psychology. If a group of employees exhibits a significantly higher level of avoidance, this could indicate a problem managing conflict, stress or professional pressure, which requires specific interventions, such as resilience building programs or organizational support strategies.

## Conclusion

The results of this study provide valuable insights into the relationship between motivation, job satisfaction, self-esteem, and avoidance tendencies, highlighting the psychological factors that influence employees' work experience.

First, the analysis of the correlation between motivation and job satisfaction indicated a moderate positive association, suggesting that more motivated employees tend to be even more professionally satisfied. This result underscores the importance of implementing organizational strategies that support both intrinsic motivation, through providing meaningful tasks and autonomy, and extrinsic motivation, through recognition and rewards.

Secondly, the correlation between self-esteem and motivation demonstrated a moderate positive link, confirming that employees with a high level of confidence in their own abilities are more motivated and more involved in professional tasks. This result is consistent with theories of self-efficacy and self-determination, which highlight the impact of personal perception on professional performance and engagement.

În ceea ce privește analiza diferențelor dintre grupuri în funcție de tendința de evitare, rezultatele testului t pentru eșantioane independente au arătat o diferență semnificativă între grupuri, indicând faptul că unii angajați manifestă un comportament mai pronunțat de evitare decât alții. Această tendință poate avea implicații negative asupra gestionării stresului, adaptabilității și performanței în muncă, sugerând necesitatea unor intervenții organizaționale care să sprijine dezvoltarea rezilienței și a strategiilor eficiente de coping.

Regarding the analysis of differences between groups according to avoidance tendency, the results of the t-test for independent samples showed a significant difference between groups, indicating that some employees exhibit a more pronounced avoidance behavior than others. This trend can have negative implications on stress management, adaptability and job performance, suggesting the need for organizational interventions that support the development of resilience and effective coping strategies.

In conclusion, the study confirms that psychological factors play an essential role in the dynamics of motivation and job satisfaction, and well-targeted interventions can improve both individual engagement and overall organizational performance.

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# Students' Perceptions of School as an Inclusive Learning Environment: A Case Study of Senior Students in Mehedinți County, Romania

**Oana AMZA**

PhD Student, West University of Timișoara, Romania, Department of Sociology (Romania)  
Email: oana.gheonea@e-uvt.ro

**Daniel GREBELDINGER**

PhD Student, West University of Timișoara, Romania, Department of Sociology (Romania)  
Email: daniel.grebeldinger80@e-uvt.ro

**Abstract:** *The modern education system must promote equality, equity and diversity, creating an inclusive environment for all students. Their perception of the school as an inclusive space is essential for adapting education to their needs, by making learning accessible, collaborating with teachers and supporting the educational team. Digital communication and technology facilitate inclusion, providing equal opportunities and stimulating constructive interactions. The development of an inclusive school requires a culture, policies and educational practices that ensure the integration of all students. The relationships between them and the sense of belonging to the school community significantly influence their well-being and educational success. Starting from the following research question: "What is the perception of adult students towards the inclusive activities and practices carried out in their school?" we formulated the following main objective: to analyze the perception of adult students on the degree of inclusion in the school. Thus, this study aims to analyze, through a quantitative approach, frequency analyses and non-parametric tests, the perception of adult students from Mehedinți County on the school in which they study as an inclusive learning environment. The research focuses on factors such as access of all students to school resources and to a quality inclusive education, interactions and collaborative relationships between students, the level of well-being and safety in the school, the support provided by teachers and the inclusion team, the use of digital tools in making learning accessible for students with special educational needs (SEN), in the development of digital organizational communication and in creating an inclusive educational climate. The results obtained highlight the need for continuous adaptation of the school to respond to student diversity and to ensure a fair and friendly educational climate.*

**Keywords:** *school; inclusive learning environment; social distancing; discrimination; well-being; accessibility.*

## 1. Introduction

The dynamics of society and the orientation of the education system towards principles such as equality, fairness, and respect for diversity make students' perception of school as an inclusive learning environment essential in shaping the directions of adaptation of the school to their needs. This study aims to provide a clear picture of how students perceive the school in which they learn from the perspective of inclusion, emphasizing the accessibility of learning for all students, the creation of positive interactions between all members of the school community, collaborative work, the level of well-being in the school, the support provided by teachers and the inclusion team to all students, and the digitalization of learning. The paper also highlights the role of digital communication in creating an inclusive educational climate. In a pandemic context, digital communication has been an essential element in education and continues to play a significant role in the learning process, but also in the school adaptation and socio-professional integration of students. Digital communication, the use of digital and artificial intelligence tools in education, makes learning more accessible, offers equal learning



opportunities to all students, can promote inclusion and diversity by building an online collaborative space and by transmitting messages that can quickly reach a very large population, contributes to the development of interactions between members of the school community and more efficient organizational communication, can support students through online counseling sessions. Digital communication contributes significantly to the creation of an inclusive school environment.

In order to achieve the educational ideal, stipulated in the Pre-university Education Law No. 198/2023 (1), the school - a term used in a broad sense, has the mission of offering all primary beneficiaries of education the optimal conditions for a harmonious multilateral development, so that they can reach their development potential, maximize their performance, integrate into the school environment, but also become active and creative citizens, members of a constantly changing society.

In the context where the school is intended to be the educational institution where all children/students are welcome, educated and protected, regardless of gender, physical, intellectual, economic, linguistic or other characteristics (UNESCO), we can talk about the school as an inclusive learning environment or about the concept of inclusive school. The development of an inclusive school is conditioned, according to Tony Booth (Booth & Ainscow, 2011, p.232), by the existence of three dimensions: inclusive culture, inclusive policies and inclusive practices.

## **2. Inclusion and discrimination in schools**

An inclusive learning environment does not only involve the implementation of the teaching-learning-evaluation process, but also the existence of a common idea at the level of the entire school community, of a common goal, the development of a set of principles that, once applied, bring well-being, motivation and a sense of belonging among students, but also among parents, teachers and all school staff. The emphasis is on creating a community that learns together, based on a permanent and solid partnership (the etymology of the word "partner" comes from the French language, where *partenaire* means together), in which each member knows, but also applies the school's Ethos, the school's strategies, the promoted practices (Rădulescu, 2005, p.117). The inclusive school is a democratic school, an environment in which various learning experiences are thought out, planned and put into practice, to which all primary beneficiaries of education must have access. It is the school that respects the principle of equality and human diversity, which offers each child/student access to all school resources and ensures real opportunities for learning, knowledge, skills and competences. The inclusive school develops and adapts constantly to meet the needs and requirements of each individual learner, that is, it offers a quality inclusive education. The educational ideal is built around moral and cultural values, but also on the needs of the student, at the school that he needs - a dynamic school, with benchmarks such as the capacity for innovation and creativity, which prepares learners for a diverse and multicultural society (Vicol, 2021, pp. 11-12).

Creating an inclusive learning environment that is safe and friendly is one of the inclusive practices that can be adopted and put into practice by any school. Arranging spaces where students can spend time together, a pleasant educational environment in which they feel good, transforming and personalizing the classroom according to the preferences of those who learn in it, rotating desks at short intervals, arranging desks in a circle so that all students can see each other (a first step towards acceptance), familiarizing students with human diversity through desegregation, are important steps in developing non-discriminatory behaviors.

In Romania, the National Council for Combating Discrimination (CNCD) defines discrimination as any differentiation, exclusion, limitation or favoritism based on criteria

established by the legislation in force (CNDC, 2021). The criteria established by Romanian legislation are: race, nationality, ethnicity, language, religion, social category, beliefs, sex, sexual orientation, age, disability, chronic non-contagious disease, HIV infection, membership of a disadvantaged category, as well as other criteria that restrict human rights and fundamental freedoms or rights recognized by law, in any field.

In school, discrimination or the phenomenon of bullying can also be accompanied by aggression (Mihai, 2012, pp.31-33) and represents a problem in any education system, an important cause of absenteeism and school dropout, exacerbated with technological evolution by another phenomenon - cyberbullying. Among students, one of the categories most exposed to stigmatization, prejudice or discriminatory behaviors is that of students with special educational needs (SEN). This must be one of the solid arguments that determine whether any school to want to become an inclusive school. The instrument applied to carry out this case study - the questionnaire - can also represent a way of measuring the level of acceptability of students with special educational needs (SEN) among the general population in the school, and this indicator is extremely important not only in the integration process, but also in achieving progress in the learning of students with special educational needs. Studies in the field of special education psychology (Verza et al., 2011, pp. 40-42) show that, in the case of students with disabilities (especially mental), positive human relationships, based on affectivity, make the learning process more efficient. Affective and motivational learning is recommended to the detriment of moral or practical learning, because these students experience difficulties in cognitive learning. They need acceptance, understanding, positive attitudes from other students, teachers, parents, and all school staff so that the school in which they study can achieve the educational ideal referred to above - the premise of quality inclusive education.

In the case of adolescents, studies conducted by Paladi O. (2022, p.135), Mihai IM (2012, p.29), reveal that the roots of discriminatory behavior lie in the model taken from the family, the lack of education for values and interest in familiarizing students with human diversity.

### **3. Student relationships and well-being**

Social distance, a classic concept in sociology, refers to “the degree of understanding and affection that people feel for each other.” (Chelcea, 2004). “Social distance is operationalized as the willingness of respondents from the general population to engage in direct social interactions with people from another group and to achieve a degree of closeness through these interactions (Kovacevic et.al., 2020). Given its meanings, (high) social distance can be an indicator of the discriminatory attitude that a majority group has towards a minority group. Referring to the present study, the social distance scale applied in the questionnaire addressed to adult students from Mehedinți County aimed to measure the attitude towards human diversity, to analyze the desire of students with typical development to accept a certain type of social relationships with peers with special educational needs, the majority group being represented by students who have reached the age of majority, and the minority group being represented by students with special educational needs in their class or school.

The classroom is a microsystem made up of students and one or several adults (depending on the level of education we are referring to) that functions based on the relationships between them. If we take a look at a school timetable from a high school class, we can easily see that a student spends more time at school, with his or her classmates, than with his or her family, other adults or other adolescents. The teacher knows the importance of a good relationship between all students in the class and makes efforts to maintain it and to permanently strengthen the cohesion of the group by applying

specific pedagogical strategies: collaborative work, in face-to-face and online formats, on educational platforms, permanent communication, which also includes digital communication, various forms of organization (in small/large groups, in pairs, sitting in a circle), adopting interactive group methods, organizing meetings in non-formal environments, organizing extracurricular activities. By creating an environment in which students feel emotionally involved, teachers can stimulate their interest and motivation, and, implicitly, academic results. In this sense, connective teaching practices can be applied (Martin&Dawson, 2009, pp.327-365), a concept according to which involvement, motivation for learning and academic performance are amplified when students develop meaningful relationships, through which they can emotionally connect with their peers, with their teachers, with the learning content. The study conducted by Kristy S. Cooper (2014, pp.363-402) reveals the impact of connective instruction. Statistical analyses have shown that connected instruction has an over seven times greater effect on student engagement compared to other teaching methods, namely academic rigor (Wolf et. al., 2005, pp. 27-53) or animated teaching and that positive and supportive relationships between students, between teacher and students, increase their level of involvement in the educational process.

Blatchford (2020) addresses the importance of relationships between students in an entire chapter and argues that they are essential for academic success, but that class size can significantly influence group cohesion and the development of students' social skills. In smaller classes, students have more opportunities to collaborate, form closer relationships and engage in meaningful group activities, interactions between them can be monitored more closely by teachers, and students with special educational needs (SEN) can more easily establish social relationships. Therefore, an inclusive educational environment, in which students feel accepted and valued, can significantly reduce social distance and facilitate the real integration of all students, regardless of their educational particularities. The purpose of the social distance scale in the questionnaire is to assess students' willingness to interact with their peers, including those with special educational needs (SEN). Digital communication can facilitate this collaboration through collaborative learning applications, projects in virtual environments, and online communication tools that allow students to collaborate independently of physical or social barriers.

The relationship between students is one of the indicators of well-being in a school. Other indicators can be mentioned, such as: academic results, relationships with all school staff, collaborative learning and a supportive learning environment for all students (inclusive environment). The reference point in the awareness of the importance of well-being (here, in school) is even one of the first definitions of health. The World Health Organization (1948) defines health as that state of complete physical, social and spiritual well-being, which is not limited to the absence of disease.

All the concepts presented above: school as a friendly and positive learning environment, cultivating healthy relationships between students, increasing motivation, resilience in the face of challenges or changes, are indicators of well-being in school. A detailed approach to the integration of positive psychology into the educational environment is offered by the author Ian Morris (2015) who shares in his book, *Teaching Happiness and Well-Being in Schools: Learning to Ride Elephants*, both theoretical foundations and practical strategies for promoting well-being among students.

There is a bidirectional relationship between students' perceptions of their learning environment and their overall well-being (Cleveland & Sink, 2018). The authors advocate including assessments of students' subjective happiness or well-being in school climate assessments as part of school improvement plans.

#### 4. The impact of digital tools

Digital tools and artificial intelligence (AI) play a key role in improving access to quality education for children with special educational needs (SEN). These technologies offer personalized solutions, tailored to the needs of each student, and contribute to creating an inclusive educational environment. Digital communication offers numerous opportunities to support the objectives of the student questionnaire. Whether it is about accessibility of education, promoting diversity or emotional support, digital tools represent a link between theory and practice, contributing to creating an inclusive, friendly and safe school environment for all students. Artificial intelligence allows the creation of adaptive educational programs, which adjust content according to the pace and learning style of each child. AI-based e-learning platforms can provide real-time feedback, facilitating individualized progress. Digital tools include screen readers, text-to-speech and voice recognition technologies, which help children with visual impairments or reading difficulties.

Educational tablets and apps can replace traditional materials, making them easier for children with motor disabilities to use. Augmentative and alternative communication (AAC) apps allow children with speech difficulties to express their thoughts and needs through symbols, images, or automatically generated text. AI-powered voice assistants can facilitate interaction and language understanding for children with autism or cognitive impairments.

Digital communication, the use of digital and artificial intelligence tools in education, makes learning more accessible, offers equal learning opportunities to all students, promotes inclusion and diversity by building an online collaborative space and by transmitting messages that can quickly reach a very large population, contributes to the development of interactions between members of the school community and more efficient organizational communication, can support students through online counseling sessions.

#### 5. Methodology

The present study aims to analyze, through a quantitative methodology, based on a sociological survey, the perception of adult students in Mehedinți County on the school in which they study as an inclusive learning environment, using the questionnaire as an instrument. It included questions related to the activities carried out in high school education units in Mehedinți County to prevent discrimination among students and to promote inclusion, with a particular focus on the integration of students with special educational needs (SEN) in the context of quality inclusive education. The questionnaire includes dichotomous questions regarding these aspects, as well as two Likert scales. The first scale, consisting of ten items, measures the perception of young people on the acceptance of students with special educational needs (SEN) and has five response options, where 1 represents "To a very small extent" and 5 represents "To a very large extent". The second Likert scale, consisting of six items and with five response options (1 - "To a very small extent", 5 - "To a very large extent"), assesses the level of discrimination perceived in schools.

Regarding the data collection stage, This extended from 06.02. 2025 to 03.03. 2025, as a result of which we obtained responses from 133 adult students.

Through this study, we aimed to answer the following research question: What is the perception of adult students towards the inclusive activities and practices carried out in their school? Thus, the main objective of this paper is to analyze the perception of adult students on the degree of inclusion in school. From this objective, we formulated the following specific objectives and hypotheses:

Objective 1: Analysis of young people's attitudes towards the integration of students with special educational needs (SEN) in mainstream schools.

- Ip1.1. Most young people are willing to accept the presence of a student with special educational needs (SEN) in their educational institution.
- Ip1.2. There are no statistically significant differences between men and women in terms of the degree of acceptance of a child with special educational needs (SEN) in their educational institution.

Objective 2: Analysis of young people's perception of the level of discrimination existing in the school environment.

- Ip2.1. Most young people consider that the degree of discrimination within their educational institution is low.
- Ip2.2. There are statistically significant differences between men and women in terms of the level of discrimination existing in the school environment.
- Objective 3: Identify the degree of implementation of activities aimed at promoting diversity and reducing discrimination carried out within students' educational institutions.
- Ip3.1. Most young people benefit from activities promoting diversity and integrating all students carried out by their educational institution.
- Ip3.2. Most young people participate in activities to prevent and combat discrimination and to promote safety and well-being within their educational institution.
- Ip3.3. Most young people have teachers who use digital tools and tools based on artificial intelligence.

## 6. Result

Following the data collection stage, we obtained responses from 133 adolescents aged between 18 (N=116; M=87.2) and 19 (N=17; M=12.8), who are in the 11th (N=31; M=23.3) and 12th (N=102; M=76.7) grades, respectively. In terms of gender distribution, we obtained more responses from female respondents (N=75; M=56.4), compared to male respondents (N=58; M=43.6).

Regarding their education profile, most respondents come from the philological profile (N=40; M=30.1), followed by those from the pedagogical profile (N=35; M=26.3), respectively by those from the tourism and food profile (N=19; M=14.3).



To identify young people's perception of accepting a student with special educational needs (SEN), we conducted a frequency analysis. According to the mean and median values, respondents believe that they are rather willing to accept the presence of a student with special educational needs (SEN) within the educational institution, being

even willing to interact with him or even be friends ( $N=133$ ;  $M=3.88$ ;  $md=4$ ;  $SD=0.94$ ). The results confirm hypothesis 1.1.

We took the nonparametric Kolmogorov-Smirnov test to identify whether the variable related to the acceptance of students with special educational needs (SES) has a normal distribution. According to the results obtained, the variable related to the degree of acceptance is abnormally distributed ( $D(133)=0.11$ ;  $p<0.005$ ).

Taking this into account, we performed a nonparametric Mann-Whitney test to identify whether there are statistically significant differences between men and women in terms of the perception of acceptance of students with special educational needs (SEN). Following this analysis, we found that there are no statistically significant differences between men and women in terms of the perception of acceptance of students with special educational needs (SEN) ( $U=2008.5$ ;  $z=-0.75$ ;  $p=0.44$ ). Thus, hypothesis 1.2 was confirmed.

Next, we conducted a frequency analysis to identify the perceived degree of discrimination within the school. According to the results obtained, students consider that school is rather an environment in which they can be accepted and safe, discriminatory attitudes and behaviors being rarer ( $N=133$ ;  $M=4.01$ ;  $md=4$ ;  $SD=0.67$ ). The results confirm hypothesis 2.1.

We took the nonparametric Kolmogorov-Smirnov test to identify whether the variable related to the perceived degree of discrimination has a normal distribution. According to the results obtained, the discrimination variable is abnormally distributed ( $D(133)=0.11$ ;  $p<0.005$ ).

Taking this into account, we performed a nonparametric Mann-Whitney test to identify whether there are statistically significant differences between men and women in terms of the perception of the degree of discrimination within the school. Following this analysis, we found that there are no statistically significant differences between men and women in terms of the perception of the degree of discrimination within the school ( $U=2166$ ;  $z=-0.04$ ;  $p=0.96$ ). Thus, hypothesis 2.2 was rejected.

We conducted a frequency analysis to identify the percentage of schools carrying out activities to promote diversity and integrate all students, regardless of their needs. Thus, we noticed that most students claim that such events take place in their schools ( $N=116$ ;  $M=87.2$ ). Very few of them mentioned that such activities do not take place in the school ( $N=17$ ;  $M=12.8$ ) (table 1). These results reflect the implementation of inclusive educational policies, inclusive practices, which promote equal rights for all students, regardless of ethnicity, nationality, gender or other differences. These results also confirmed hypothesis 3.1.

We conducted a frequency analysis to verify the share of students involved in activities to prevent and combat discrimination and promote safety and well-being in their school. According to the results obtained, the majority of students participate in such activities ( $N=97$ ;  $M=72.9$ ). Only about a third of respondents claimed that they did not participate in such activities at all ( $N=36$ ;  $M=27.1$ ) (table 1). Thus, through these activities, schools promote non-discriminatory attitudes and contribute to the school and socio-professional adaptation and integration of all primary beneficiaries. These results also confirmed hypothesis 3.2.

A frequency analysis was conducted to observe the extent to which teachers use digital and artificial intelligence-based tools in the learning process. Thus, the majority of students who participated in the study mentioned that their teachers implement such tools in the educational process to improve it and make learning more accessible for all students ( $N=107$ ;  $M=80.5$ ) (table 1). Only about 20% of them claimed that these tools are not used by their teachers ( $N=26$ ;  $M=19.5$ ). The results indicate a high integration of

technology in the educational process, which can improve the accessibility of learning for all primary beneficiaries and reduce social inequalities. These results also confirmed hypothesis 3.3.

**Table 1. Frequency statistics related to activities carried out within high school educational institutions, with the aim of promoting diversity and reducing discrimination**

	Number (N)		Percentage (M)	
	Yes	Not	Yes	Not
Activities to promote diversity	116	17	87.2	12.8
Involving students in anti-discrimination activities	97	72.9	36	27.1
Use of technology by teachers	107	80.5	26	19.5

## 7. Conclusions

The results of this study indicate a favorable attitude of young people towards the integration of students with special educational needs (SEN) in high school educational institutions. Many respondents stated that they are willing to accept the presence of these students in their school and to interact with them or even become friends with them, which suggests an increased openness towards inclusion and acceptance of diversity. Also, the non-parametric Mann-Whitney statistical analysis did not reveal significant differences between men and women in terms of the degree of acceptance of students with SEN, thus confirming that positive attitudes towards their integration are relatively uniform between the sexes.

Regarding young people's perception of discrimination in the school environment, most respondents believe that the level of discrimination in their schools is low, which suggests the existence of an educational climate favorable to inclusion.

Another important result of this study was related to the degree of implementation of activities to promote diversity and prevent discrimination. The majority of young people reported that their schools carry out activities aimed at encouraging the inclusion of all students, which denotes a sustained institutional effort to create a fair, inclusive educational environment. Also, more than two-thirds of students stated that they participate in activities to prevent discrimination and promote well-being in school, which suggests active involvement in initiatives to strengthen social cohesion.

A significant result of the study is related to the integration of technology in the educational process. Most students stated that their teachers use digital tools and artificial intelligence-based tools to improve access to learning content for all students and to streamline the entire teaching-learning-assessment process. This aspect highlights the trend of modernization and digitalization of the educational system and contributes to reducing educational inequalities and increasing learning motivation among students.

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# Doctoral Students' Perspectives on Learning English as a Complementary Module in Algeria: An Exploration of Challenges and Recommendations

Asma MERINE

Naama University Centre (Algeria)  
Engineering Training and Projects Design Laboratory  
Email: merine@cuniv-naama.dz

**Abstract:** *In light of the current Englishization movement, using English as a global language has grown in popularity as a way to improve doctoral students' language skills and get them ready for the global marketplace. All Algerian doctoral students have recently been exposed to English language proficiency tests to get B2 level with the support of specialized teachers; however, there have been a number of difficulties with this new instruction. Therefore, the purpose of this study is to investigate the Algerian higher education doctoral students and instructors' viewpoints on the integration of English as a complementary module in the formation. To put it in a different way, the current research work tries to explore the challenges encountered by doctoral students when learning English as an additional module and suggests potential remedies to address these challenges. The current work was carried out with thirty doctoral students from different institutions and specialities in addition to two teachers with varying specializations who are responsible for teaching PhD students. The outcomes of the study showed that although studying English can provide students the chance to enhance their language proficiency and have access to global academic resources, doctoral students are still challenged by several dilemmas which can be categorized as psychological and pedagogical.*

**Keywords:** *Doctoral students; Englishization; language skills; proficiency tests; workshops.*

## 1. Introduction

Over the past few decades, the world has greatly advanced in the fields of economics, education, science and technology. Such rapid growth provoked an urgent request of a language for the global community that could facilitate communication and exchanges in all fields. Obviously, the choice fell on English as it is the international language in the modern era throughout its historical background. Today, English is the dominating language for global interaction and exchange of ideas among people from different nations and continents around the world. It is required for countless purposes, which have solidified its status as a lingua franca. Therefore, mastering this language is definitely crucial and highly recommended for many spheres of practice. Algeria like many other countries has recognized the significance of English proficiency as a significant factor to internationalise higher education and prepare learners with essential competences to be more competitive in the 21 Century. As a result, Algerian policy makers begin to adopt it as the medium of instruction in all phases in education, starting from the primary schools and ending with higher educational universities. Actually, doctoral students are not an exception to this trend. In this vein, the current research work aims to find out answers to the following research questions:

- To what extent do doctoral students consider learning English as a positive experience?
- What challenges and barriers do doctoral students encounter in learning the English Language?

## 2. English Language Status in Algeria

In Algeria, 81% of the population speaks Arabic as the primary language. Arabic is not only a mother tongue, but has also been the official language of Algeria since 1963. Another official language in Algeria is Tamazight which is a Berber language. Apart from these languages, several other dialects are used for communication by Algerians (Merine, 2020).

Years ago, the French language had official status, and it was the primary language that was inserted in trench-colonial times within the educational sector, it is still often taught in Algerian schools and used in the Algerian administration. In this respect, Benrabah (2007, p. 233) asserts that “95% of postgraduate courses in sciences and 95% of undergraduate courses in medicine and technical fields are conducted in French at universities.” In fact, the French language is introduced in primary schools and it is inducted as early as grade 3. On the other hand, the English language is considered a foreign language and it was introduced in middle school in the first grade.

In fact, the English language becomes a universal language due to the discovery of oil and the supremacy of the British Empire throughout the 18th, 19th, and early 20th centuries economically, politically and scientifically (Phillipson, 1994). In his part, Crystal (1997) confirms that English as a lingua franca serves as a bridge that facilitates communication and cultural exchange among people in today's globalized world. Interestingly, an agreement was established to enhance economic and research collaboration among European nations, which was subsequently expanded to incorporate several North African countries through initiatives like ERASMUS. Further, there were intense discussions and heated debates regarding the selection of languages to be included between the educational ministries and communities across Europe. Although many universities in bilingual or trilingual countries in Europe provide programs and courses in various languages, the decision was made to select English. In this context, Algeria has embraced the Bologna Agreement, resulting in the educational system investment to foster multilingualism such as English and French. By late 1990s, Algeria emerged to be the second- largest French-speaking community. Despite the predominance of French in administration, education, media, and government during the colonial period, its usage has declined in several advanced sectors. Accordingly, there was a broad consensus that English ought to supplant French due to the latter's association with colonialism. The understanding of Algerian youth on the distinctive global status of English has markedly increased since the 2004 study. In this vein, Miliani (2000) emphasises that within a context where the use of the French language has diminished significantly in the educational spheres of the country, English emerged as the ultimate remedy for various challenges, encompassing economic, technological, and educational issues.

Currently, English is increasingly utilised in Algeria and is regarded as a reputable language; as noted in an article being published in an Algerian journal, the Ministry of Education in Algeria has identified the learning of English and its promotion as an essential factor in improving access to academic, technological and cultural networks on a global scale. In the same line of thought, Deirdre Nicholas (2012), responsible for the English Project at the British Council, states: “The main ambition of the training was to produce a series of training workshops that provided both practical and concrete outcomes for the participants.” Consequently, English has established itself as the primary international language and should facilitate connections between Algeria and the global community, notwithstanding the significant roles that Arabic, Berber, and French already occupy in Algeria's linguistic landscape.

English as an international language significantly influences various regions of Algeria by facilitating exchanges with other countries. The language is selected as the medium of civilization, and its prominence compels global adoption. In Algeria, English may play a role in fostering social and political stability, expanding access to economic opportunities that could enhance the nation's economy, and promoting mutual friendship between the global community and Algeria. All countries share a common objective regarding education, leading to an emphasis on learning foreign languages, particularly English. This language is ultimately associated with various sectors in Algeria, including business, aviation, tourism and economic.

### **3. English as a Medium of Instruction in Algeria**

The Algerian authorities have pointed out the significance of English instruction and the importance of mastering English as part of the efforts to update and internationalise the country's educational system. Indeed, a resolution was taken by the Ministry of Higher Education on July 21, 2019, that Arabic and English languages should be used in all official documents instead of the French Language. In this respect, EMI arose as a new term and it is viewed as an effective tool to enhance educational quality, facilitate interaction and communication, improve students' competitiveness in the global employment market, and enhance the appeal of Algerian universities to international students and scholars. Moreover, it is also agreed that the use of EMI in higher education institutions is in line with increasing students' demand for English language education due to the fact that English becomes the language of international communication, and having English language proficiency surely assists in succeeding in various fields.

Many scholars present various definitions on the concept (Pecorari & Malmström 2018; Macaro 2020; Richards & Pun 2023) highlighting distinct features such as the contextual factors and the language proficiency expectations for students. Many researchers in the educational field have defined EMI (English as a Medium of Instruction). While interpreting EMI, Cummins and Davison (2007) define it as a case where learners get academic training in a language that is not their native tongue, with that language serving as the major medium of instruction, i.e. EMI is a form of bilingual education whereby students are expected to be competent in the instructional language and their mother tongue as well. Moreover, the use of EMI in higher education institutions is tailored to meet the growing needs of students who have come to regard English as an essential medium of international relations and business, and thus, being proficient in English will ensure success across multiple endeavours. In the same line of thought, Macaro (2018) defines EMI as the use of the English language as the main medium of instruction in educational contexts where the first language of learners is not English. This refers to a setting in which students receive academic instruction in a language that is not their native language, with that language serving as the main medium of teaching.

EMI programs have already begun to be implemented in many countries aiming to better prepare students for the global economy and job market. Algeria is not an exception; the government has recently adopted EMI in higher education institutions. In fact, EMI is growing on a global scale in non-native English-speaking countries to equip students with essential skills for success either academically or occupationally. However, its implementation presents numerous challenges concerning English proficiency and the training of both instructors and students in the language.

#### **4. English as a Complementary Module in Doctoral Studies in Algeria**

The role of English as a universal language in technology, business, and scientific research has prompted higher education policymakers to implement it as the primary medium of instruction. During the academic year 2023-2024, the Algerian Ministry of Higher Education and Scientific Research, headed by Professor BEDARI Kamel, has made a new decision to enhance the use of English in academia. Consequently, in February 2023, the ministry initiated an English program addressed to all doctoral students belonging to all specialities in Algeria, in addition to philosophy, didactics and Information and Communication technology. Actually, the reasons behind this sudden decision were to promote the visibility of Algerian universities on the global platform and also to equip doctoral students with essential skills to improve their English language proficiency in the 21st century so that they will be able to read and write scientific articles using English.

The first step that was taken by the ministry was to create an online platform addressed to doctoral students. The platform includes various activities related to different skills: reading, listening, grammar activities, vocabulary, etc. At the very beginning, students were exposed to a placement test to figure out their current level in English; accordingly, students were divided into four groups: level A1, level A2, level B1 and level B2. They were provided with personal professional emails and passwords to be able to use the online platform. The next step was the selection of teachers 'Associate Professors or Professors' to guide them and conduct workshops. The workshop took place every three months at the centre of intensive language learning within the university. Students are divided based on their levels and they present oral presentations. It is the role of the teacher to help and evaluate them.

As far as the presentations are concerned, students with A1 level are asked to describe and talk about themselves: their physical appearance, personal interests and hobbies, educational background and future aspirations. They were asked to utilize appropriate adjectives and vocabulary in their description, using clear and concise language to ensure understanding, practising this activity aloud to improve fluency and pronunciation and finally revise their assignment for any grammatical mistakes before the oral presentation. Then, students with A2 level are invited to prepare a 15-minute talk about COVID-19 and its impact on general health matters by defining COVID-19 and the way it spread all over the world, symptoms and prevention of COVID-19, the impact of it on general health and well-being. In this vein, they are asked to employ reliable sources like government health websites or academic sources, and once they gather sufficient information, their presentation should be organized in a clear and simple structure. Their presentation will be assessed based on the content, clarity, delivery and use of visual Aids. However, in level B1, PhD students have the choice to select one of the suggested topics for a 15-minute talk. Finally, in level B2, doctoral students have a 15-minute talk on a topic of their choice related to their studies and research.

Every three months, doctoral students are exposed to a workshop followed by a placement test. Concerning the placement test, each level has its activities and it lasts one hour and 45 minutes. Different activities are included, such as listening and filling in the gaps, reading and reordering, putting the correct tense, choosing the right answer etc. All the students have to obtain B2 level. Students who fail to pass to a new level will be exposed to the same test in the next test. All in all, the ministry of higher education made it a must for students to obtain a B2 level; otherwise, they cannot get their Doctorate diploma.

## 5. Methodology

In the current study, a mixed-method approach was employed to investigate doctoral students' and teachers' perspectives towards learning English as a complementary module in Algerian Higher Education and Scientific Research due to the recent Englishization drive, focusing on challenges and possible strategies for success. To answer the questions, the first research tool utilised during the data collection was a questionnaire to elicit profound answers from doctorate students that would assist both educators and policymakers engaged in the decision-making process.

The participants selected to complete the questionnaire are all doctoral students enrolled in doctoral studies in different institutions at Salhi Ahmed Centre University. The questionnaire was administered using Google Forms to allow for easy data collection and analysis. The total number of students is 30. They belong to five different institutions, namely: Institution of Law and Political Science (12 students), Institution of Technology (06 students), Institution of Letters and Languages (03 students), Math and Information and Communication Technology (03 students) and Institution of Nature and Life Sciences (06 students). The specialities are demonstrated in detail in the following table:

**Table 1: Doctoral Students' Specialities**

<b>Institution</b>	<b>Frequency</b>	<b>Percentage</b>
Institution of Law and Political Science	12	40%
Institution of Technology	6	20%
Institution of Letters and Languages	3	10%
Institution of Math and Information and Communication Technology	3	10%
Institution of Nature and Life Sciences	6	20%
<b>Total</b>	<b>30</b>	<b>100%</b>

The questionnaire was written in simple English, and students were invited to answer questions. Actually, the questionnaire is divided into parts. The first part contains personal information about students' age, gender and their speciality. The second section includes Yes/ No questions about learning English in order to gauge the extent to which the participants consider their experience of learning English. Actually, they would decide if they view such experience as positive or negative. The next theme aims to find out if students believe they are making progress in their learning through the workshops they are exposed to. Last but not least, they are invited to provide any further comments or ideas not asked in the previous questions. The questions vary from Likert Scale, multiple choice and Yes/ No format questions. Such questions were used to get a more comprehensive understanding of the addition of English as a complementary module in the Algerian tertiary context.

Secondly, a semi-structured interview has been selected in the current research work because it allows the collection of further information and more detailed data and, therefore, getting a better exploration and valid answers to the research questions. The interview was addressed to teachers for the sake of exploring their opinions regarding the integration of English in doctoral studies in Algerian higher education. Additionally, the interview intends to offer the participants an opportunity to express their perspectives on the present topic that may result in substantial future ramifications. The first section contains personal information about teachers' gender, specialty, teaching experience and the degrees being obtained. On the other hand, the second section deals basically with the major challenges students face, the impact of this initiative on students' learning outcomes and suggesting possible solutions that can ensure its success in Algeria.

## 6. Results and Discussion

Once the data had been collected, different analysis methods were employed for the qualitative and quantitative data. The quantitative data analysis was performed with the SPSS (Statistical Package for the Social Sciences) software in order to run a detailed statistical analysis of the corresponding data. For the qualitative data, i.e. the interview, a descriptive analysis method was used to identify and report patterns within the data and, therefore, contributing to a more comprehensive understanding. As a matter of fact, this part show the study results in relation to the raised research questions including the challenges and implications of supporting the decision-making process regarding the incorporation of English as a complementary module.

### 6.1. Doctoral Students' Questionnaire Results

The present study involves Algerian PhD students in higher education, selected using purposive sampling. A total of 30 students were invited to take part in the study, and all the participants agreed to participate.

The number of male students is high compared to female. Out of 30 participants, 23 (76,7%) are males and 7 (23,3%) are females.

**Table 2: Students' Gender**

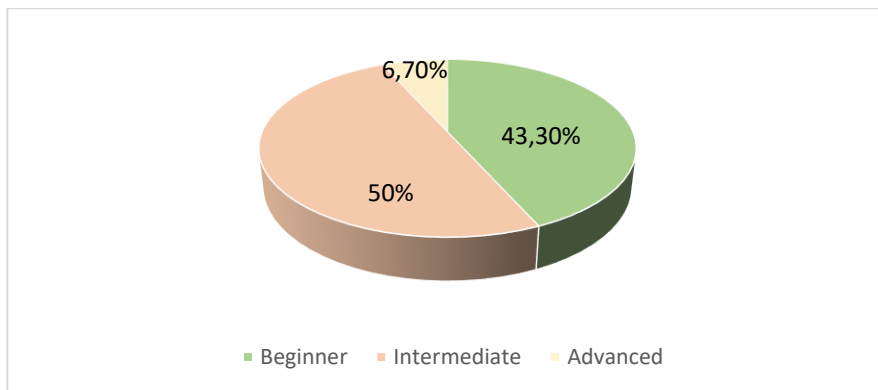
	<b>Frequency</b>	<b>Percentage (%)</b>
Male	23	76,7%
Female	07	23,3%
Total	30	100%

The age range data is categorized into four groups: 'lessthan30', '31-40', '41-50', and 'over 50 years old'. The results indicated that(46.7%), the highest percentage, corresponds to the second category, '31-40', followed by 8 participants, representing(26.7%), in the '41-50' group. Subsequently, (20%) for the category of those under 30 years old. The last category, 'over 50 years old,' accounts for only (6.7%). The age range is diverse, as PhD contests in Algeria do not impose a certain age; however, there was a notable prevalence of younger students.

**Table 3: Students' Age**

	<b>Frequency</b>	<b>Percentage (%)</b>
Less than 30	6	20%
31-40' category	14	46,7%
41-50' category	8	26,7%
over 50 years old	2	6,7%
Total	30	100%

This question aimed to evaluate students' level in English language. The findings revealed that (50 %)of the respondents have an intermediate level of English language proficiency; (43,3%) are beginners and only (6,7%) have an advanced level as it is shown in the following pie-chart:



**Figure 1: Students' English Level**

Interestingly, (83,33%) of the participants have positive perception towards learning English. They declared that they greatly need English language skills for their academic and occupational development as English becomes a global language. Also, they must write their articles using English or at least the abstract for some specialties. On the other hand, only (16,66%) have a negative attitude towards learning English due to the various challenges they face including the lack of grammar, vocabulary and pronunciation. They added that it is a long time they did not get in touch with this language.

**Table 4: Students' Perception towards Learning English**

	Frequency	Percentage (%)
Positive Experience	25	83,33%
Negative Experience	05	16,66%
Total	30	100%

Various techniques can be employed to assess the reliability of a questionnaire. 'Cronbach's Alpha' was employed in this context. The typical range for Cronbach's Alpha values is between 0 and 1. A higher Alpha value, approaching 1, indicates an increased internal consistency among the items in the instrument being evaluated. SPSS was employed to compute 'Cronbach's Alpha' to assess the interrelatedness of the closed items in each version of the questionnaire. The subsequent data indicate the values of Cronbach's Alpha for the two elements of the study: the online platform and the online courses.

**Table 5: Measuring Reliability (Cronbach's Alpha)**

Online platform		Reliability Statistics	
- Online courses		Alpha Cronbach	N of elements
Reliability Statistics			
Alpha Cronbach	N of elements	,964	4
,953	3		

As mentioned previously, the study questionnaire was analyzed through descriptive statistics. The results show that the item with the highest statistical analysis of mean

scores is the first item (I can use the platform easily) with a mean score of ( $M=4,40$ ;  $SD=,724$ ), i.e. the majority of the participants strongly agree that the platform can be used easily. The second item (The resources and activities used on the platform are effective) with a mean score of ( $M=3,80$ ;  $SD=,887$ ); this indicates that they also strongly agree that the resources and activities being used on the platform are effective. As far as the content is concerned, many participants strongly agree that the content of the courses is clear, with a mean score of ( $M=3,70$ ;  $SD=,915$ ).

**Table 6: Students' Perception towards Online Platform**

Items	Mean	S.D.
I can use the platform easily.	4,40	,724
The content of the courses is clear.	3,70	,915
The resources and activities used on the platform are effective	3,80	,887
Online Platform	3,9667	,80872

The statistical analysis results show that the majority of the respondents strongly agree that the online courses are useful, with a mean score of ( $M=4,07$ ;  $SD=,740$ ). In the same respect, they agree that online courses help them to achieve a high academic level. Furthermore, they agree that online courses motivate them to achieve high English language proficiency, as shown in the third item ( $M=3.17$ ). However, the majority of them did not agree that the online courses do not meet their educational needs, with a mean of ( $M= 2.83$ ).

**Table 7: Students' Perception towards Online courses**

Items	Mean	S.D.
The online courses are useful	4,07	,740
Online Courses help me to achieve high academic level	3,27	1,230
Online courses motivate me to achieve high English language proficiency	3,17	1,289
Online courses meet my educational needs	2,83	1,172
Online courses	3,3583	1,07215

A correlation was measured to determine if there is a relationship between using online courses effectively and achieving a high academic level. The correlation of these variables reveals that there is a statistically significant positive correlation ( $r =,97$ ), i.e. Increasing the quality of online courses, students' academic achievement will surely increase. Also, the findings show that there is a statistically significant positive correlation ( $r =,98$ ), i.e. when the quality of online courses is increased, students will be highly motivated to learn. In other words, with the decrease in the quality of online courses, students' academic achievement and motivation will absolutely decrease.



**Table 8: Correlation between Online Courses and Academic Achievement**

\*\* . Correlation is significant at the 0.01 level (2-tailed)

Correlation		Online Courses	Online Courses help me to achieve high academic level
Online Courses	PearsonCorrelation	1	,978**
	Sig. (2-tailed)		,000
	N	30	30
Online Courses help me to achieve high academic level	PearsonCorrelation	,978**	1
	Sig. (2-tailed)	,000	
	N	30	30

**Table 9: Correlation between Online Courses and Motivation**

		Online Courses	Online courses motivate me to achieve high English language proficiency
Online Courses	Pearson Correlation	1	,985**
	Sig. (2-tailed)		,000
	N	30	30
Online courses motivate me to achieve high English language proficiency	Pearson Correlation	,985**	1
	Sig. (2-tailed)	,000	
	N	30	30

\*\* . Correlation is significant at the 0.01 level (2-tailed)

This part is devoted to asking the students about the major challenges they are facing in learning English, i.e. in online courses, the workshops and the placement test as well. Indeed, the following table shows that overcoming the fear of failure is ranked as the first challenging issue at (M=4,53), followed by lack of vocabulary(M=4,17). Pronunciation problems are ranked at a high level (M=4,07). They lack grammatical structures, which is also ranked at a high level (3,87). Next, doctoral students suffer from a Lack of understanding (M=3,77). Moving to dealing with challenging questions, it is also classified at a high level (3,63). Concerning psychological issues, doctoral students suffer at a high level from the lack of confidence being ranked at (M=3,47). On the other hand, for time constraints, which are ranked at a low level (M=2,40), it is the only issue that students do not find a challenging one.

**Table 9: Doctoral Students' Challenges**

	<b>M</b>	<b>S.D.</b>
Lack of vocabulary	4,17	1,085
Lack of grammatical structures	3,87	1,137
Pronunciation Problems	4,07	,785
lack of confidence	3,47	1,074
Time Constraints	2,40	1,380
Lack of understanding	3,77	1,006
Dealing with challenging questions	3,63	1,273
Overcoming fear of failure	4,53	,730

## 6.2. Teachers' Interview Results

In fact, two associate professors were interviewed because they are the only responsible for conducting English workshops and attending placement tests. ESP is the specialty of the first interviewee while sociolinguistics is the specialty of the second participant being interviewed.

The first question seeks to understand the interviewees' initial opinions about the decision to integrate English as a complementary module in doctoral studies in Algerian higher education. The first question is formulated to figure out the interviewees' perception towards this decision. Both of them strongly support the integration of English as a complementary module for doctoral students. They stated that this initiative has a great impact on PhD students' academic success because they will be equipped with the linguistics skills that allow them to read and write articles related to their field of study or at least write abstracts. This will empower them with confidence and, therefore, proficiency in the English language, which becomes a global language.

The second question aims to explore the significance of English workshops, which are addressed to doctoral students. By asking this question, the interviewees are expected to talk about the content of workshops provided by the Ministry of Higher Education and their significance in enhancing students' language proficiency and communication skills needed in their field of study. In level B1, PhD students have the choice to select one of the suggested topics for a 15-minute talk. The topics are presented in this way:

➤ Presentations on a Topic:

1. The Impact of Social Media on Society
2. The Benefits of Learning a Second Language
3. The Future of Renewable Energy
4. My Future Plans

To present one of the previous topics, students firstly have to select a subject that appeals to him/her, gathering information about the chosen topic, organizing the information into a logical sequence, creating an outline or structure for the presentation and finally developing slides or visual aids to support the presentation.

➤ Storytelling:

1. A Memorable Travel Experience
2. An Imaginary Adventure in Outer Space
3. A Childhood Memory That Shaped You

In storytelling, students are invited to choose a personal or fictional story to share, developing the characters, setting, and plot of the story, then, writing a draft of the story, paying attention to the language used, ensuring coherence and flow by editing and revising the narrative, practising reading the story aloud, emphasizing expression and clarity and finally presenting the story by capturing the attention of the audience through storytelling techniques.

➤ Debate or Discussion:

1. Should School Uniforms be Mandatory?
2. Is Technology Making People More or Less Connected?
3. The Pros and Cons of Artificial Intelligence
4. Is Online Learning as Effective as Traditional Learning?

In debate and discussion, students with B1 level are asked to choose a topic to debate, doing some research and compile arguments for both sides, putting the supporting points and counterpoints in a logical order, preparing notes or cue cards to guide the discussion or debate, presenting arguments and at the same time considering tone and persuasive language, at the end, participating in the discussion or debate while respecting others' viewpoints and offering well-supported arguments.

➤ Poster Presentations:

1. The Impact of Climate Change on the Environment
2. Exploring Cultural Diversity Around the World
3. The Benefits of Regular Exercise and Healthy Lifestyle
4. Promoting Gender Equality in the Workplace
5. The Role of Technology in Education Transformation

In poster presentations, students at the very beginning select a topic that interests them, gather relevant information and facts about the topic, determine the key points and create a visually appealing layout for the poster, design the poster using appropriate graphics, images, and text, practice a concise presentation summarizing the content of the poster, and finally display the poster and deliver the presentation, engaging with the audience and answering questions.

➤ Role-Play :

1. A Job Interview Scenario for a Dream Job
2. Resolving a Conflict Between a teacher and a student

In the last choice, students were asked to imagine roles or scenarios for the chosen topic, plan the dialogue and interactions, create a script or outline, including key lines and actions, focus on timing, delivery, and coordination as they rehearse the Role-Play, practice the role-play several times to ensure seamless transitions and a clear grasp of the roles and finally act out the role-play, bringing the characters and plot to life and involving the audience in the performance. Finally, in level B2, doctoral students have a 15-minute talk on a topic of their choice related to their studies and research.

In response to this question, teachers stated that doctoral students recognize the incredible role of English as a universal language and that achieving an advanced level of English proficiency is obligatory and not an option. However, there is a common perception that students who belong to Arabic and Law departments tend to have a weak level of English. On the other hand, students who belong to scientific institutions have a high level of English language, and this is due to the technical nature of their studies, which require reading research papers, and writing reports using the English language. The teachers added that the efforts made by the Ministry of Higher Education and Scientific Research by offering workshops and placement tests make it possible for students to make considerable progress in their English language proficiency. Last but not least, both teachers stressed the significance of acquiring a high English language proficiency, especially to write articles.

This question was basically oriented towards investigating the major challenges that doctoral students face when attending workshops and having placement tests. One interviewee declared that many students at the very beginning could not use English correctly. They could not express their thoughts adequately because English was not afforded sufficient significance during their education. Not surprisingly, both teachers

confirmed that some students suffer from pronunciation problems. Additionally, they suffer from a lack of vocabulary to formulate sentences and, at the same time, a lack of grammatical structures and lexical features to express their ideas accurately. They added that PhD students will surely find difficulties when it comes to writing research papers, citing sources correctly, and coherently conveying complex ideas.

### **7. Recommendations:**

Since English has become a core subject in doctoral studies in Algeria, more efforts ought to be put in place. Based on the results, it is obvious that English workshops are effective but not enough for students who have a weak level. Therefore, to boost the integration of English in Algerian higher education, the following suggestions are proposed aiming to help students overcome or at least decrease the major challenges that prevent them from learning English faster and effectively:

- Along with workshops, additional courses for students will be of great importance to help them learn the main grammatical structures and features and acquire new concepts. Thus, the workshops should also emphasize on meeting students' educational needs. Then, conducting other workshops on how to write articles in English in their field of specialization, covering the essential steps and methodology to write a scientific article.
- Within the sessions, teachers must take all students' challenges into account, including lack of vocabulary and grammar, pronunciation problems. Also, students' psychology should not be taken for granted, as the current research revealed that there are some psychological factors that hinder students in learning English.
- Guiding them to use resources and platforms like Duolingo, Babbel, or Rosetta Stone, which they will help them develop their English language grammar, vocabulary, and pronunciation practice in an organized way.
- To further develop their speaking skill, guide them to sign up for beginner English classes on platforms like Coursera, edX or Udemy.
- Collaboration among learners within educational platforms by sharing information. Such platforms could be social media handles, discussion boards or even forums that discuss specific topics related to their speciality.
- Reading English books, articles, and academic journals related to the field of study will enhance their English language skills.
- Doctoral students should ask language teachers, native speakers, and internet tutors what they want to improve or what they require in order to work better on their English competencies. Enhancing English language skills boosts self-confidence in using English in academic settings and better interactions as well.
- Since there are students over the age of 40 years old, the "Andragogy Method" will undoubtedly be effective. It is an instructional method applied to adult learners. Andragogy is more concerned with distinguishing features and needs of an adult than pedagogy which concentrates on children and their needs. This method promotes a problem-centered approach to learning based on real-world issues where adults are given problems that need solving. Such an approach engenders critical thinking skills, problem-solving skills and active involvement in the learning process.
- Encouraging students to join the centre of intensive language learning within the universities to learn more because the English workshops are not enough for some students especially those with a weak level.

- Last but not least, there is an urgent need for a revision of the objectives of the workshops, materials to be used in the workshops and online platforms, as well as the assessment methods to be employed.

## 8. Conclusion

The Algerian government has acknowledged the crucial role of English education and the significance of English language competency as part of its attempts to modernise and internationalise the country's educational system. In this vein, the Ministry of Higher Education and Scientific Research has imposed the integration of English as a complementary module in doctoral studies. Students are exposed to English workshops followed by a placement test. Therefore, this research work explores and figures out doctoral students' and teachers' perceptions towards this decision. In light of the present research results, the participants assisted in providing a clear image of the significance of online English courses in increasing their motivation and academic success, in addition to the major difficulties that they face in learning this global language. In their part, the teachers highlighted the importance of guiding students to reach the B2 level. Overall, the results shed light on the significance that may arise from the integration of English policy into the Algerian higher education system. While the majority of the participants believed that it was a valuable initiative, they also highlighted some of the challenges that are important to overcome. As a matter of fact, the success of this new policy greatly depends on various factors, including the quality of online platforms and courses, support of teachers and administration, and the motivation of all students to adapt with the changes required. Last but not least, the incorporation of English as a complementary module in the higher education context has both challenges and opportunities. However, if sufficient assistance and resources are made available to the students, the quality of education will certainly be improved, and students will be well prepared for the globalised world.

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# Theoretical Foundations and Legal Developments in Contemporary Corporate Governance

Mădălina OTOVESU (MORMOE)

PhD Student, Doctoral School of the Faculty of Law, University of Craiova (Romania)

Email: madalinamormoe@yahoo.com

**Abstract:** *This article investigates corporate governance as a complex legal institution situated at the intersection of organizational theory and company law, within a broader context of economic transformation and transnational regulation. Through a theoretical and legal approach, the study analyzes the core explanatory paradigms—agency theory, stakeholder theory, and stewardship theory—as foundational frameworks that shape both legal norms and the institutional architecture of corporate entities. These theories are not merely analytical tools; they provide the epistemological and normative justification for legal regulations concerning shareholders' rights, directors' fiduciary duties, and mechanisms of control and oversight. In this light, corporate governance is conceptualized as a legal mechanism for balancing divergent interests, serving functions of normative compliance, decision-making transparency, and accountability toward stakeholders. The article further examines the diversity of comparative legal regimes—from the Anglo-American shareholder-value model to the Continental European model of codetermination—highlighting the influence of institutional context on the normative construction of governance. Recent research directions are also discussed, focusing on the integration of sustainability, board diversity, and the adaptability of governance structures in emerging economies. The study contributes an integrative perspective on corporate governance as a legal institution shaped by socio-economic theories but consolidated through formal regulation, within an increasingly fragile balance between private autonomy and public interest.*

**Keywords:** *corporate governance; legal institutions; agency theory; comparative company law; corporate sustainability*

## Introduction

The study of corporate governance constitutes a field of inquiry that extends beyond the confines of traditional management and economics, bringing to the fore the interactions among various control structures, decision-making mechanisms, and multiple stakeholder groups. Fundamentally, it is not limited to the implementation of rules and practices aimed at ensuring effective managerial oversight, but rather focuses on understanding the interdependence between diverse actors within a dynamic and multifaceted context. Moreover, contemporary research in corporate governance addresses the continuous need for companies to adapt to the demands of a global economic environment characterized by volatility, rapid regulatory changes, and increasing transparency requirements.

From an academic standpoint, this area of study emphasizes how power and control are distributed within organizations, underlining the necessity of comprehending the dynamics among shareholders, boards of directors, and executive teams. The central issue resides in the potential conflict between principals and agents—a theme addressed by numerous theoretical perspectives that highlight the need for sophisticated control and monitoring mechanisms to oversee managerial behavior. Additionally, corporate governance serves as a regulatory instrument for corporate conduct, aiming to prevent excessive risk-taking and to ensure the long-term sustainability of companies.

Recent research has increasingly focused on ethics and social responsibility, reflecting a paradigm shift from traditional governance models. Corporate governance is no longer seen as a mere contractual relationship between shareholders and management but must be analyzed as part of a broader system of relationships in which companies

engage with multiple categories of actors—from employees and customers to governments and local communities. As a result, the importance of transparency and ethical behavior becomes paramount, as these elements influence the long-term stability of organizations and public trust in the capital market.

Another aspect that underscores the relevance of studying corporate governance is the impact of technological change and new business models on the ways organizations are structured and led. The emergence of global tech companies and digital platforms has introduced new challenges in terms of responsibility allocation and control, necessitating ongoing revisions of governance rules. In the context of digital transformations, traditional governance structures struggle to cope with the accelerated pace of change and the continuous evolution of the economic ecosystems in which companies operate.

Equally significant is the influence of globalization and the expansion of international markets, which add another layer of complexity to the analysis of corporate governance. The interaction among diverse legal and economic systems has already generated the need to harmonize governance rules and standards to address the challenges posed by transnational markets and divergent regulatory frameworks. In this context, studying corporate governance becomes essential for companies operating on a global scale, as they require flexible mechanisms that allow them to function effectively in different cultural and economic environments without compromising their stability or accountability.

Thus, the contemporary relevance of corporate governance research lies not only in examining the relationships between shareholders and management but also in addressing broader issues with significant implications for the performance and sustainability of organizations in a global and dynamic context.

### **1. Definitions and Conceptual Boundaries**

Corporate governance is a central concept in the study of economics and organizational management, approached from multiple theoretical perspectives, all of which emphasize the relationships among shareholders, boards of directors, and executive leadership. Broadly defined, the term refers to the set of rules, practices, and processes by which companies are directed and managed. It is a domain with far-reaching implications, and its definitions vary considerably depending on theoretical approaches and the economic, legal, and cultural contexts in which they are applied.

For the purposes of this study, we adopt the working definition provided by Tembeci (2014), who states that corporate governance is a system that determines the distribution of responsibilities and rights among various actors involved in a company's operations—such as shareholders, executive management, the board of directors, and other stakeholders. This system encompasses a set of rules, procedures, and practices that govern how economic decisions are made within a company, with the primary goal of ensuring its efficient and ethical functioning.

Following the line of classical definitions frequently cited in the literature, Shleifer and Vishny (1997) describe corporate governance as a set of mechanisms through which a company's external financiers ensure the recovery of their investments. In this view, the authors emphasize the control exercised by shareholders and creditors over the management, offering a clear description of the potential conflict between managers and owners. This definition reveals an intrinsic tension within corporate structures, where management, as an agent, may have interests that diverge from those of shareholders, who are the main beneficiaries of the company's performance. Consequently, corporate governance not only regulates this relationship but also establishes specific mechanisms for monitoring managerial decisions.

The Cadbury Report (1992) introduces a different yet complementary definition, viewing corporate governance as the system by which companies are directed and controlled. This definition broadens the scope of governance to include both internal and external control mechanisms, thereby raising the issue of managerial responsibility not only toward shareholders but toward all stakeholders. This approach offers a more comprehensive framework for understanding how management and boards must collaborate to ensure the proper and transparent operation of a corporation. It is worth noting that the Cadbury Report was published in the early 1990s, in an international context marked by corporate scandals and a widespread erosion of trust in financial markets, which prompted a call for reform in corporate leadership practices, with a strong emphasis on control and transparency.

Defining corporate governance also requires a clear distinction from related concepts such as management, leadership, or internal control. According to Mintzberg (1979), management is the process of planning, organizing, coordinating, and controlling organizational resources to achieve established objectives. While management focuses on operational decision-making, corporate governance regulates how those decisions are overseen and controlled to ensure alignment with shareholder interests. Corporate governance thus becomes an instrument of accountability, requiring managers to comply with the rules set by boards of directors and shareholders.

Leadership, by contrast, is defined as the ability to influence and motivate individuals to achieve common goals (Yukl, 2013). It relies on the personal capacity of a leader to inspire and guide a team, whereas corporate governance provides the formal and institutional framework that regulates how leaders act and are supervised. Leadership and corporate governance are not mutually exclusive, nor are they overlapping; instead, they function in a complementary manner. An effective leader enhances organizational performance, but that performance must be assessed and kept in check through governance mechanisms. Thus, we may deduce that governance ensures that leaders' decisions are aligned with the organization's objectives, resources, and the interests of shareholders.

Internal control represents another concept closely related to corporate governance. According to COSO (2013), internal control consists of a set of policies and procedures implemented to safeguard organizational assets, ensure the accuracy of financial reporting, and promote compliance with regulations. Although internal control and corporate governance intersect, they serve different purposes and apply to different levels of the organization. Internal control is an operational mechanism aimed at reducing risks and preventing errors, typically managed at the departmental level. In contrast, corporate governance operates at a broader level, overseeing strategic decisions and safeguarding shareholder interests through effective supervision.

Business ethics introduces a philosophical and moral dimension to the discussion of corporate governance. As Crane and Matten (2016) note, business ethics refers to the application of moral principles in organizational decision-making and to how companies engage with all stakeholders, not just shareholders. Although corporate governance includes ethical elements such as transparency and accountability, it remains a formal and institutionalized system. Business ethics, on the other hand, approaches both individual and collective organizational behavior from an axiological and normative perspective, emphasizing the social and cultural impact of decisions. While corporate governance focuses on managerial oversight and the protection of shareholder interests, business ethics transcends this narrower scope by addressing the moral responsibility of corporations toward society at large.



Corporate Social Responsibility (CSR) adds an additional dimension to the governance discourse. According to Schreck (2011), CSR refers to the commitments made by companies to contribute to social welfare and environmental protection, extending beyond the legal and economic requirements of business. In contrast to corporate governance—which is oriented toward safeguarding shareholder interests through formal regulatory frameworks—CSR entails the voluntary assumption of responsibilities toward society and the environment. CSR encompasses a wide range of stakeholder interests, including those of employees, local communities, and non-governmental organizations. Moreover, it is rooted in a sustainability perspective that integrates economic, social, and environmental goals.

International models of corporate governance reflect significant variation based on cultural and legal contexts. The Anglo-Saxon model, specific to the United States and the United Kingdom, emphasizes shareholder value maximization and managerial oversight through capital markets. As Mallin (2013) explains, this model is characterized by a clear separation between ownership and control, with boards of directors playing a central role in managerial monitoring, while capital markets act as external regulatory mechanisms. This model provides shareholders with considerable flexibility and enables markets to discipline management by evaluating performance based on stock price fluctuations.

In contrast, the German model of corporate governance is based on a dual board structure, in which there is a clear separation between the management board (*Vorstand*) and the supervisory board (*Aufsichtsrat*). In this model, employees play an active role in the decision-making process. The dual structure features a strict separation between management and supervisory functions, and employee participation is institutionalized through codetermination laws, which grant workers the right to appoint representatives to the supervisory board. As Schneider (2012) emphasizes, this arrangement gives employees significant influence over strategic decisions and represents a marked departure from the Anglo-Saxon model, where decision-making power is more concentrated in the hands of shareholders and oversight is less participatory.

In Japan, the corporate governance model is shaped by close relationships between corporations and the banks that finance them. Ownership is typically concentrated in the hands of other corporations or financial institutions, and the model is less dependent on capital markets. Instead, it emphasizes long-term relationships with stakeholders, such as employees and suppliers. Aoki (2001) points out that decisions in Japanese firms are generally based on broad consensus between management and shareholders, and that managerial oversight is exercised indirectly through boards of directors. This model prioritizes stability and sustainable growth, and differs from the Anglo-Saxon model by encouraging deeper stakeholder engagement in governance processes.

Corporate governance models differ substantially depending on each country's legal and economic culture, and each comes with its own advantages and challenges. Adapting these models to the specific context of a company is essential to ensure effective and responsible operations, as well as to meet the varying needs and priorities of stakeholders. These models offer diverse solutions for managing the relationship between management and shareholders and for ensuring appropriate oversight, thereby contributing to the efficient functioning of corporations at the global level.

Corporate governance is a subject explored across multiple academic disciplines, each emphasizing different dimensions of the concept in accordance with its own paradigms and methodologies. As such, various fields claim the right to examine corporate governance from specific angles, highlighting fundamental aspects relevant to their

disciplinary perspectives. This pluralistic approach enables the integration of corporate governance into distinct conceptual frameworks, with each discipline focusing on particular traits without being confined to a single theory.

From the standpoint of economics—whether organizational or financial—the focus is primarily on the efficiency of resource allocation and how corporate governance can influence financial performance. Within this domain, special attention is given to how governance mechanisms can reduce agency costs resulting from conflicts of interest between shareholders and management. Shleifer and Vishny (1997: 739) stress that corporate governance structures are designed to establish mechanisms that prevent managers from acting in ways that diverge from shareholders' interests. Thus, economics places a strong emphasis on the analysis of incentives that drive superior corporate performance and efficient use of economic resources.

Legal studies of corporate governance focus on the legal frameworks and regulations that govern relationships among shareholders, executive leadership, and boards of directors. From this perspective, corporate law aims to establish clear legal norms, protect shareholder rights, and ensure transparency in organizational decision-making processes. Cadbury (1992: 11) highlights the crucial role of legal regulation in ensuring effective oversight of management, underscoring the importance of accountability and a transparent reporting framework. Legal research in this area examines control mechanisms that prevent abuses of power and ensure compliance with applicable legislation.

Political science approaches corporate governance through the lens of power dynamics and the relationship between corporations and political institutions. This perspective emphasizes how economic power and political influence intersect, and how corporations shape public policy. Mallin (2013) explores how corporations may influence governmental decision-making processes, while also stressing the importance of an adequate regulatory framework to balance corporate economic power. Political science thus seeks to understand how public-private relationships are governed and how these interactions affect markets as well as economic and social policy outcomes.

Sociology, by its very nature, offers a distinct perspective on corporate governance by emphasizing social structures, power dynamics, and interpersonal relations within organizations. Sociologists examine organizational culture and the social frameworks that shape corporate behavior and decision-making. Schneider (2012) highlights that power and authority relations are essential components in the way corporate governance is exercised and shaped across different cultural and organizational contexts. Sociology also explores how social norms influence corporate structures and decision-making processes, as well as their impact on organizational responsibility and transparency.

Organizational psychology approaches corporate governance from the standpoint of individual and group behavior within organizations, analyzing in detail how decisions are made and influenced by psychological factors. It focuses on motivation mechanisms and decision-making processes at both individual and collective levels, investigating the influence that leaders exert on teams and organizational performance. Mintzberg (1979: 202) explains how group dynamics and decision-making behavior can affect organizational outcomes, stressing the importance of a regulatory framework that monitors and guides these processes to ensure transparency and efficiency within organizations.

## 2. The Historical Evolution of Corporate Governance

The historical evolution of corporate governance traces an extended timeline that reflects the economic, social, and legal transformations which have shaped the relationships between those who manage and those who own capital, from prehistoric societies to contemporary corporations. In its earliest forms, economic organization did not involve clearly defined governance structures, yet the presence of collective norms and leaders responsible for managing communal resources indicates rudimentary forms of economic coordination.

In Ancient Rome, we find the first organizational structures resembling modern corporations. One of the most influential forms of economic organization was the *collegia*, an institution which, although serving various purposes, can be seen as a precursor to modern corporate entities. *Collegia* were professional or religious associations in which members shared common interests and collaborated to achieve collective goals. These included guilds of craftsmen and merchants as well as religious or funerary societies (Perry, 2006).

The role of the *collegia* in the Roman economy was significant, as they provided a formal framework for cooperation and regulation of economic activities—much like modern corporate boards. Each *collegium* operated under its own set of rules, established by its members and recognized by the state. Members contributed to the organization through regular payments and participated in meetings that governed professional and economic conduct (Duff, 2008).

Beyond their economic function, the *collegia* also served important social purposes. Members benefited from economic and legal protection within the group, and in the case of funerary associations, burial services were provided—an early form of corporate social responsibility. The Roman state recognized these associations but sometimes imposed restrictions to prevent the excessive concentration of economic or political power. In this sense, *collegia* operated under state oversight and control, anticipating modern forms of corporate regulation (Morck & Steier, 2005).

During the medieval period, economic structures were reshaped by the decline of the Roman Empire and the emergence of feudal economies. Medieval guilds inherited many functions of the *collegia*, organizing craftsmen and merchants into associations that regulated production, enforced quality standards, and protected their members through rigid rules. Guilds also played a key role in training future generations of craftsmen through formal apprenticeship systems. They controlled access to trades and shielded their members from unfair competition (Greif, 2006).

This period also saw the emergence of early commercial corporations that operated under rudimentary forms of corporate governance. The Dutch East India Company (VOC) and the British East India Company are early examples of organizations that developed oversight and control mechanisms akin to modern governance structures. Although structured around feudal models of state concessions, these corporations introduced sophisticated governance practices, including shareholder participation in major decisions and a separation between ownership and management (Holton, 2024). These principles would later become foundational to the modern corporate model, especially the division of power and control.

The Industrial Revolution of the 18th and 19th centuries brought fundamental changes to economic structures, marking a shift from agrarian to industrial production. This context enabled the rise of large-scale corporations, which required formalized governance frameworks to manage substantial capital investments. The emergence of boards of directors and the managerial accountability to shareholders introduced a clear separation between capital owners and executive leadership. During this period,

corporate governance began to crystallize in the form recognized today, featuring clear structures of responsibility and transparency that are vital for long-term corporate success (Morck & Steier, 2005).

In the modern era, corporate governance has become a core element of global financial market functioning. Following the economic and financial crises of the 20th century, corporate governance was formalized through national and international regulations aimed at ensuring transparency and board accountability. The 1992 Cadbury Report is regarded as a milestone in the development of modern corporate governance, emphasizing the importance of financial reporting and independent managerial oversight (Cadbury, 1992).

The evolution of corporate governance thus reflects a slow but continuous transition from rudimentary social structures and small-scale economic organizations to the large corporations that dominate the contemporary global economy.

Within this trajectory, the **Four-Pillar Model of Cooperative Governance**, as articulated by Scholl and Sherwood (2014), presents a structural framework tailored to the specific needs of cooperative organizations, contrasting sharply with models designed for traditional corporations. These four pillars are conceived to reflect the foundational principles of cooperatives, maintaining a strong connection between internal governance and cooperative values. The model offers a coherent and practical approach applicable at all levels of governance—from the board of directors to the general membership. It emphasizes core dimensions such as collaboration, accountability, strategic leadership, and democracy, and provides an integrated vision of how a cooperative should operate.

### **Teaming (Collaboration)**

The first pillar, *Teaming*, refers to the necessity for board members and other leadership bodies to collaborate effectively in pursuit of shared goals. This pillar is fundamental to any cooperative, as its success relies on the ability to function as a well-organized and cohesive team. Scholl and Sherwood emphasize that within boards, it is essential to establish clear agreements on roles and objectives, along with an efficient decision-making system that values diverse perspectives. Teaming entails fostering and maintaining an organizational culture that supports teamwork and values individual contributions. According to the authors, a cooperative's effectiveness is directly dependent on the board's ability to cultivate and sustain such a culture of collaboration.

### **Accountable Empowerment**

The second pillar, *Accountable Empowerment*, stresses the balance between delegated authority and the responsibility of those entrusted with it. In the context of a cooperative, this aspect is critical for enabling leaders and managers to make decisions while being held accountable through well-defined mechanisms. Accountable empowerment, as described in the Four-Pillar Model, involves the clarification of expectations, the assignment of specific duties, and continuous monitoring of outcomes. The authors also refer to the *Policy Governance* model, which has been implemented in numerous cooperatives to clarify roles and responsibilities, ensuring that delegation of authority does not lead to abuse or a lack of accountability.

### **Strategic Leadership**

The third pillar, *Strategic Leadership*, concerns the board's role in defining the cooperative's direction and objectives. It requires a long-term vision that extends beyond financial considerations to include the social and cultural dimensions of the cooperative's mission. The board must set the organization's strategic course, secure the necessary resources to achieve its goals, and monitor progress toward those goals. Strategic leadership also involves the development of collective wisdom and the ability to make informed decisions based on a deep understanding of market conditions and member needs. The authors stress the importance of continuous knowledge accumulation and the cultivation of collective decision-making competencies.

### **Democracy**

The fourth and final pillar, *Democracy*, affirms the foundational principle of any cooperative: democratic participation by its members. Democracy in a cooperative context goes beyond the mere act of voting; it entails meaningful and active engagement by members in shaping and transforming the organization. Members have rights to information, expression, and representation, and the board of directors must take into account their diverse needs and expectations. The authors highlight the importance of fostering alignment and shared understanding among members regarding the cooperative's strategic decisions.

### **Contemporary Corporate Governance Attributes**

Tembeci (2014) identifies several key characteristics that distinguish modern corporate governance from its earlier forms:

- **Responsibility** – focused on how companies assume responsibility toward shareholders and other stakeholders.
- **Transparency** – emphasizes the importance of providing accurate, clear, and accessible information to all stakeholders.
- **Fairness** – refers to the equitable treatment and justice afforded to all parties involved in corporate activity.
- **Competence** – reflects the ability of boards and management to make sound decisions for the long-term well-being of the organization.

## **3. Theories of Corporate Governance**

### **3.1. Agency Theory**

Agency theory, a foundational concept in corporate governance, emerged from the work of economists in the 1970s, particularly Michael Jensen and William Meckling. They defined it as a contractual relationship between two parties: the principal and the agent (Jensen & Meckling, 1976). In the corporate context, this theory examines the dynamics between shareholders, who own the company's capital (the principals), and executive management, who are responsible for managing that capital on their behalf (the agents). A potential conflict of interest arises in this relationship, as the agent—who controls the company's assets—may not always act in accordance with the principal's objectives. There is a risk that decisions will reflect managerial self-interest rather than the interests of shareholders. Therefore, agency theory underscores the necessity of governance mechanisms designed to align managerial behavior with shareholder expectations and to monitor and mitigate such conflicts.

A central element of agency theory is the concept of *agency costs*, which arise when the interests of the two parties—principals and agents—are not fully aligned. These costs include the expenditures associated with monitoring and controlling the agent's

activities, as well as the economic losses resulting from suboptimal decisions made by the agent. In the scholarly literature, agency costs are considered unavoidable in any situation where the principal delegates authority to an agent. Indeed, much of modern corporate governance has been developed specifically to minimize these costs. Jensen and Meckling (1976) argued that one way shareholders can reduce agency costs is by creating effective mechanisms for monitoring executive management—such as the establishment of boards of directors and the implementation of compensation policies designed to align managerial interests with those of shareholders.

Applying agency theory within the context of corporate governance requires a deep understanding of how governance structures can reduce conflicts between shareholders and executive leadership. The board of directors plays a crucial role in this regard, tasked with monitoring management activities and ensuring that decisions are made in the best interest of shareholders. The board's role is one of active oversight, and its effectiveness depends on the independence and competence of its members, who must evaluate and supervise managerial performance. An effective board can reduce agency costs by establishing a system of accountability and transparency that ensures management acts in accordance with the company's objectives and shareholder expectations.

In modern corporate governance, agency theory has expanded beyond the relationship between shareholders and management to include the interactions among a company's various stakeholders. For example, creditors, employees, and even the broader community may have interests that diverge from those of shareholders or executives. Agency theory can be applied to these relationships to analyze how governance structures can mediate and balance competing interests. In this expanded view, corporate governance involves more than the oversight of management; it also encompasses the creation of frameworks capable of reconciling multiple stakeholder interests (Fama & Jensen, 1983).

Another important aspect of agency theory relates to executive compensation policies. Numerous studies suggest that compensation design can serve as an effective tool for aligning managerial behavior with shareholder interests, thereby mitigating agency risks. Performance-based bonuses and stock options are commonly used strategies to incentivize executives to focus on shareholder value maximization. However, such practices are not without controversy, as they may encourage short-termist behavior by managers at the expense of long-term corporate sustainability and growth (Shleifer & Vishny, 1997).

From the perspective of agency theory, corporate governance entails a set of mechanisms and processes that regulate relationships among economic actors and ensure that management fulfills its duties toward shareholders and other stakeholders. These mechanisms include, in addition to boards and compensation policies, reporting structures and audit systems designed to foster transparency and accountability. Traditionally, Anglo-Saxon governance systems have emphasized agency theory, highlighting the centrality of shareholders and the board in supervising management and minimizing conflicts of interest.

Globally, the application of agency theory varies depending on each country's governance system. In developed economies such as the United States and the United Kingdom, corporate governance is largely shareholder-oriented, with a strong focus on monitoring executives and assessing financial performance. By contrast, in emerging economies or systems with more concentrated ownership—such as those in Germany or Japan—agency theory is applied within a broader context that places greater emphasis on the interests of employees, communities, and other stakeholders (Schmidt & Spindler,

2002).

### 3.2. Stakeholder Theory

Stakeholder theory, developed primarily by R. Edward Freeman in 1984, offers an alternative to the traditional shareholder-centric approach. It posits that a corporation should not be solely focused on maximizing shareholder value, but must also consider the interests of all parties involved in its economic activities. This theoretical framework emerged as a response to dominant corporate practices in preceding decades, in which shareholders were viewed as the exclusive relevant actors in decision-making processes.

Stakeholder theory emphasizes that organizations must orient their policies and practices not only toward shareholders but also toward employees, customers, suppliers, local communities, and other entities with which the corporation interacts. In this view, corporations have multiple obligations to diverse stakeholder groups, and fulfilling these obligations contributes to the organization's long-term success. Rather than promoting a one-dimensional goal such as shareholder value maximization, this theory highlights the interdependence among stakeholder groups and the importance of achieving a balance among their interests. Freeman (1984) proposed a model in which the corporation acts as a node in a network of stakeholder relationships, each with its own expectations and contributions to the organization's well-being.

In the context of corporate governance, stakeholder theory introduces a significantly broader framework of responsibility than that proposed by traditional agency theory, which focuses exclusively on the relationship between shareholders and executive management. Stakeholder theory calls for governance mechanisms that allow for the consideration of all relevant stakeholder interests. Accordingly, the board of directors is no longer solely responsible for overseeing management on behalf of shareholders, but is also tasked with balancing divergent stakeholder interests and promoting a more ethical and socially responsible form of governance. The corporation, therefore, is conceptualized not merely as an economic or financial entity oriented toward profit, but as a social actor with wide-ranging responsibilities.

A concrete example of stakeholder theory applied to corporate governance is the active involvement of employees in decision-making processes, as seen in European governance models such as that of Germany. In this model—known as *codetermination* (*Mitbestimmung*)—employees are entitled to representation on company boards, granting them a voice in decisions that affect their work and well-being. Thus, stakeholder theory not only redefines the role of the board but also expands the notion of power within the organization, redistributing decision-making authority across multiple interest groups (Schmidt, 2004).

Another significant example of stakeholder theory applied to corporate governance is the growing importance of **corporate social responsibility (CSR)**, which reflects increased attention to the impact that corporations have on society and the environment. By implementing CSR policies, corporations assume responsibility for the consequences of their decisions on local communities and ecosystems. This approach is directly connected to stakeholder theory, as it acknowledges that shareholder interests should not be prioritized to the detriment of other groups interacting with the organization. For instance, corporations in the energy sector—such as BP or Shell—have begun integrating environmental and sustainability policies into their strategic frameworks to respond to the demands of civil society and regulatory authorities, thereby ensuring they address the concerns of their stakeholders (Crane & Matten, 2016).

Stakeholder theory also redefines how companies approach relationships with suppliers and customers. Unlike traditional shareholder theory, which emphasizes

maximizing shareholder value through cost reduction and revenue maximization, stakeholder theory proposes that long-term partnerships based on trust and cooperation with suppliers and customers can enhance corporate stability and long-term success. In a globalized economy, sustainable supplier relationships—grounded in ethical practices and respect for the local business environment—have become a central concern for companies that implement stakeholder-oriented governance. As such, companies like Unilever and Nestlé have adopted responsible sourcing policies in which suppliers are evaluated not only in terms of price and quality, but also in terms of the environmental and social impact of their operations.

From a stakeholder theory perspective, corporate governance becomes a process of ongoing negotiation between the interests of the various groups that interact with the organization. This is reflected in more democratic and participatory decision-making structures, in which stakeholders are consulted and engaged in key governance processes. Such structures are frequently encountered in nonprofit organizations and cooperatives, where stakeholder theory is directly applied, and organizational success is measured not only through financial indicators but also by the satisfaction and engagement of all involved parties.

Although originally formulated as an alternative to the traditional shareholder-centric governance model, stakeholder theory has gradually gained ground and become a central component of modern governance frameworks. The increasing complexity of the business environment and the growing awareness of the social and environmental effects of economic activity have contributed to the widespread application of this theory, which redefines the role and responsibilities of the corporation in contemporary society.

### 3.3. Stewardship Theory

*Stewardship theory*, also referred to as *custodial governance theory*, represents an alternative approach to traditional models of corporate governance, particularly in contrast to agency theory. At its core, stewardship theory suggests that managers and executives do not act solely out of self-interest, but under appropriate conditions, they are intrinsically motivated to act in the best interests of the organization and its shareholders, contributing to its long-term success (Davis, Schoorman, & Donaldson, 1997). This theory offers a distinct view of managerial roles, emphasizing trust, altruism, and commitment to shared goals, rather than assuming an inherent conflict of interest between shareholders and managers as posited by agency theory.

A key premise of stewardship theory is that managers may adopt a *custodial* attitude toward organizational resources, aiming to protect and manage them for the benefit of all stakeholders. In this view, managers are not perceived merely as rational economic agents seeking to maximize personal gain, but as individuals who embrace ethical and moral responsibility for the collective good. This perspective implies that when managers are given autonomy and are not subject to excessive constraints, they will seek to enhance the organization's development, guided by an understanding of the interdependence between personal and organizational success.

Applying stewardship theory to corporate governance involves adopting practices and structures that foster trust and collaboration between shareholders and executive leadership, rather than focusing on strict oversight and control, as agency theory recommends. For example, in an organization governed by stewardship principles, boards of directors do not focus solely on monitoring management and preventing abuses of power; rather, they act as facilitators of collaboration and long-term, goal-oriented leadership. This approach promotes the idea of active and responsible participation by all parties in the decision-making process and aims to cultivate an organizational culture



built on trust and shared values (Hernandez, 2012).

What distinguishes stewardship theory from other governance models is its emphasis on interpersonal relationships and the psychological and social context in which managers operate. This theory assumes that when managers are provided with a working environment that encourages autonomy, loyalty, and recognition of individual contributions, they are more likely to exhibit responsible behavior aimed at the organization's long-term development. Unlike agency theory—which relies on continuous oversight and financial incentives to align managerial and shareholder interests—stewardship theory posits that non-financial motivations such as self-efficacy, loyalty, and recognition can significantly influence managerial behavior (Davis et al., 1997).

In organizations that adopt stewardship principles, executive compensation policies are not based solely on short-term financial performance but reflect a more comprehensive assessment of managerial contributions to organizational success. Rather than focusing on short-term monetary rewards, companies may implement evaluation systems that consider long-term managerial involvement in organizational development and sustainability initiatives. Thus, stewardship theory not only redefines how organizational success is conceptualized but also proposes a holistic approach to evaluating and motivating managers.

In addition to the aforementioned dimensions, the application of **stewardship theory** has significant implications for the relationship between shareholders and executive management. While agency theory assumes that shareholders must adopt an active monitoring role and impose control mechanisms to prevent managerial abuses, stewardship theory posits that shareholders and managers should cooperate in an open, trust-based relationship. As a result, boards of directors and shareholders shift their focus away from constant managerial oversight and toward supporting and facilitating collaboration in pursuit of shared objectives (Donaldson & Davis, 1991).

A relevant example of stewardship theory applied to corporate governance is the governance model practiced in nonprofit organizations and cooperatives. These organizations often operate based on principles that emphasize social responsibility, community involvement, and sustainable development. In such contexts, stewardship theory becomes particularly relevant, as managers and organizational leaders are not solely oriented toward profit maximization but are also committed to generating a positive impact on society and the environment. The application of stewardship principles fosters trust-based relationships between leadership, employees, and community members, facilitating the pursuit of goals that transcend the economic boundaries of the organization (Hernandez, 2012).

This theory thus redefines how relationships between managers and shareholders are understood, proposing a model grounded in trust, collaboration, and altruism. It suggests that managers, when provided with a supportive work environment, will be motivated not only by financial incentives but also by the desire to achieve shared objectives and to fulfill their responsibilities in an ethical and accountable manner.

### 3.4. Resource Dependence Theory

**Resource Dependence Theory (RDT)**, developed primarily by Jeffrey Pfeffer and Gerald R. Salancik in their seminal work *The External Control of Organizations: A Resource Dependence Perspective* (1978), proposes a framework in which organizations are viewed as entities engaged in constant interaction with their external environment in order to secure the critical resources necessary for survival and development. According to this theory, one of the primary challenges faced by organizations is to reduce their dependence on external resource providers and to maximize control over those resources.

Consequently, organizations must devise strategies to manage external relationships and ensure access to key inputs. Within this framework, resource dependence becomes a driving force behind organizational structure and behavior.

The theory suggests that a company's governance must be shaped in ways that minimize its vulnerability to external dependencies. Accordingly, governance structures must be equipped to actively manage external relationships in order to secure a stable flow of essential resources, including capital, information, and raw materials.

From the RDT perspective, the board of directors is not merely an internal control mechanism but plays a vital role in managing the organization's external dependencies. By appointing board members with strong external connections and expertise in resource management, organizations can reduce their exposure to external constraints. Pfeffer and Salancik (1978) argue that a board composed of individuals with external influence can facilitate access to critical resources and reduce the uncertainty associated with external dependencies.

Importantly, this theory recognizes that organizations are not fully autonomous entities but depend to a significant extent on other organizations for the resources they require to survive. These resources may include capital, technology, skilled labor, market access, or vital information. Consequently, companies are compelled to form strategic alliances, build networks, and negotiate favorable terms with external partners to secure the resources on which they depend. Pfeffer (1972) emphasizes that organizations that effectively manage their external relations and diversify their resource sources are more likely to mitigate the risks associated with reliance on a single supplier or market.

From the perspective of resource dependence theory, corporate governance becomes an active process of managing the interdependencies between the organization and its environment. This includes strategic approaches such as co-optation, partnerships, and acquisitions to reduce exposure to external resource risks. For example, appointing government representatives or major investors to the board can provide better access to favorable regulations or capital, thus enhancing competitive advantage and reducing potential vulnerabilities (Hillman et al., 2009).

RDT also maintains that organizations can leverage the power acquired through control over resources to influence their external environment. This may involve exerting pressure on suppliers or other organizations to obtain more favorable conditions, either through contractual arrangements or strategic alliances. In doing so, companies can actively reduce uncertainty and shape more stable conditions for securing essential resources (Davis & Cobb, 2010).

A concrete example of RDT application in corporate governance is found in the technology sector, where major firms such as Apple or Microsoft manage key supplier relationships and external partnerships to secure access to critical components or innovative technologies. These companies structure their boards to include individuals with strong ties to the tech industry and access to strategic resources. By doing so, they reduce dependency on a single supplier or global market fluctuations and reinforce their competitive positioning in the long term (Pfeffer & Salancik, 1978).

A company that diversifies its resource base and expands its network of external partnerships is less vulnerable to environmental disruptions. This is especially relevant in highly volatile industries such as energy or telecommunications, where companies depend on critical resources that are sensitive to external factors, including regulatory changes and global market price volatility (Hillman et al., 2009).

#### 4. Current Research Directions

The current and emerging directions of research in the field of corporate governance, as presented in the article by Pandey and collaborators (2022), reflect a significant diversification of topics and methodologies within this area. Recent studies have increasingly focused on emerging themes such as corporate social responsibility (CSR), sustainability, and board diversity—all of which have become increasingly relevant as corporations face growing pressure from stakeholders, regulators, and investors to adopt more transparent and ethical practices.

The article provides a detailed bibliometric analysis of the scholarly literature and identifies six main themes that have constituted the core of corporate governance research: theoretical foundations of governance, ownership structures, governance mechanisms and firm performance, corporate disclosures, the role of boards of directors, and the study of family businesses (Pandey et al., 2022: 130). While these themes have historically underpinned the field, they have evolved in response to changes in the business and economic environment. For instance, CSR and sustainability research has expanded significantly in recent years, driven by societal expectations for corporations to contribute to social and environmental well-being.

Another important emerging area is the corporate governance of family businesses, a relatively new yet increasingly dynamic research domain. Studies in this field seek to examine how unique ownership and control structures influence both financial and non-financial outcomes, as well as how these firms address challenges related to leadership succession and the preservation of core business values (Pandey et al., 2022: 145).

Additionally, a future trend in governance research involves the Chinese context. Recent studies explore how the unique features of the Chinese economy and corporate structure affect governance mechanisms. These inquiries are relevant not only for understanding China but also for other emerging economies with similar institutional frameworks (Pandey et al., 2022: 148).

Regarding research methodology, the use of bibliometric analyses has enabled a clearer mapping of emerging themes and trends, providing valuable insights into the future directions of the field. This method also offers a useful framework for scholars in identifying new research opportunities, particularly given the rapid transformations occurring within the realm of corporate governance.

Gabrielsson (2017) identifies several current and emerging research directions in the field of corporate governance:

##### 1. The Interaction between Governance and Entrepreneurship

One major research avenue explored by Gabrielsson is the interaction between **corporate governance and entrepreneurship**. Traditionally, corporate governance has been primarily associated with large, mature firms; however, recent research suggests that governance structures also play a crucial role in emerging and small-scale enterprises. Gabrielsson emphasizes that, in such firms, boards of directors are not limited to supervisory functions but actively contribute to growth and innovation. In particular, independent board members can offer valuable expertise and access to business and financial networks, which is critical for young firms seeking rapid growth (Gabrielsson, 2017: 6).

Future research will likely focus on how governance structures can be adapted to promote entrepreneurship across different organizational forms. Of particular interest is the role that boards of directors may play in the success of startups and firms operating in highly dynamic industries, where the pace of innovation and access to critical resources present significant challenges. Studies indicate that such firms require more flexible,

innovation-oriented governance structures, distinct from traditional models centered on risk control and compliance.

## 2. Governance in the Context of Globalization

Another important theme in Gabrielsson's article is the extension of corporate governance research to the **international context**. He notes that most existing studies are based on developed economies in Western Europe and the United States, leaving room for further exploration of governance practices in emerging markets or regions with distinct institutional frameworks (Gabrielsson, 2017: 12). In countries with less developed financial markets or alternative regulatory environments, governance structures may vary significantly, and future research must explore how these differences affect firm performance.

Such research must address complex questions regarding the **adaptability of governance structures** across diverse cultural and economic settings. For instance, in emerging economies where formal institutions are weaker, **informal networks** and personal relationships may play a much more prominent role in governance than in mature economies. These distinctions suggest that classic governance models may require substantial adjustment to function effectively in local contexts.

## 3. The Role and Diversity of Boards of Directors

A further major point discussed in the article relates to the **role of boards of directors** and the **diversity** of their members. Gabrielsson highlights that board diversity—whether in terms of gender or professional experience—has become an increasingly prominent topic of research. Studies indicate that diversity can enhance the board's capacity to make informed decisions and to provide varied perspectives on strategic issues (Gabrielsson, 2017: 14).

Moreover, diversity contributes to greater legitimacy and transparency in the eyes of external stakeholders. Future research will likely examine how diverse boards influence long-term organizational performance and help prevent risky decisions that could threaten economic stability.

## 4. Governance and Sustainability

Recent studies have increasingly focused on **integrating sustainability into corporate governance structures**. Gabrielsson observes that a significant portion of contemporary research investigates how boards of directors can contribute to the implementation of sustainable and responsible practices—both economically and socially (Gabrielsson, 2017: 16).

This trend reflects a shift in stakeholder expectations, with increasing demands for corporations to assume greater responsibility for the **social and environmental impacts** of their activities. Future research in this area is expected to delve deeper into the interaction between corporate governance and sustainability performance, with a particular emphasis on **non-financial reporting** and the role of boards in managing **environmental and social risks**.

## 5. Control Mechanisms and Innovation

Finally, the article points to an emerging research direction concerning the **interaction between control mechanisms and corporate innovation**. Gabrielsson notes that traditional governance mechanisms—such as strict managerial oversight and internal control policies—have been designed to minimize risk. However, in the context of innovative firms, these rigid mechanisms may actually discourage the risky initiatives that could lead to valuable innovation (Gabrielsson, 2017: 18).

## Conclusions

Corporate governance is a central concept in managing the relationships between shareholders, boards of directors, and executive management. It encompasses the set of rules, practices, and processes by which companies are directed and controlled, aiming to ensure adequate oversight of managerial activities and to protect shareholders' interests. This concept is examined through various disciplinary lenses—such as economics, law, political science, sociology, and organizational psychology—each emphasizing different facets of governance.

In organizational and financial economics, the focus lies on resource allocation efficiency and the reduction of agency costs, given the potential conflicts between shareholders and management. Corporate governance provides structural mechanisms that facilitate the monitoring of managerial behavior and help prevent deviations from shareholder interests. Shleifer and Vishny (1997) emphasize that governance structures are essential for establishing systems that discourage managerial misconduct and ensure alignment with organizational goals.

In corporate law, governance research emphasizes the protection of shareholders' rights and the enforcement of regulatory and legal compliance. The Cadbury Report (1992) defines corporate governance as the system by which companies are directed and controlled, highlighting managerial accountability to all stakeholders. This definition not only reinforces the protection of shareholders but also underscores the importance of transparent reporting and corporate responsibility.

Political science offers another dimension to the study of corporate governance by analyzing how corporations both influence and are influenced by political institutions. The interplay between economic and political power is a key theme, examined both in terms of corporate contributions to public policy and the regulatory frameworks that constrain corporate influence.

Sociology and organizational psychology focus on interpersonal dynamics and social structures within organizations. In the context of governance, these disciplines investigate organizational culture, power relations, and decision-making behaviors, aiming to understand how such structures influence strategic decisions and organizational performance. For example, Schneider (2012) discusses the influence of social norms on governance, emphasizing the need to comprehend collective behavior in strategic processes.

International models of corporate governance show substantial variation depending on legal and cultural contexts. The Anglo-Saxon model, dominant in the U.S. and the U.K., prioritizes shareholder value maximization. By contrast, the German model, characterized by a dual board structure, grants employees a significant role in decision-making processes. This model, known as *codetermination*, ensures employee representation on supervisory boards, giving them a strong voice in corporate governance.

Corporate social responsibility (CSR) is a closely related concept that adds an ethical and social dimension to corporate functioning. CSR emphasizes the organization's commitment to social, economic, and environmental well-being, transcending immediate financial interests. Schreck (2011) argues that CSR incorporates voluntary measures designed to balance economic goals with social and environmental concerns, providing a comprehensive vision of the corporation's societal role.

Agency and stakeholder theories offer distinct perspectives on governance. Agency theory, developed by Jensen and Meckling (1976), views governance as a contractual relationship between shareholders (principals) and managers (agents), focusing on mitigating conflicts of interest. In contrast, stakeholder theory, advanced by

Freeman (1984), asserts that organizations have obligations toward all involved parties, not just shareholders. This theory broadens corporate responsibility and promotes more ethical and balanced governance models.

Corporate governance continues to evolve within a dynamic and complex environment shaped by global economic, technological, and social changes. Recent research reveals a diversification of themes, especially in areas like CSR and sustainability, as well as a growing focus on board diversity, amid rising awareness of inclusion and the importance of diverse perspectives in strategic decision-making. Pandey et al. (2022) note increasing academic attention to the social impact of corporations and sustainability regulations, with numerous studies now exploring the interaction between financial and non-financial performance indicators.

At the same time, global trends point toward a shift to more participatory governance, where all stakeholders—not just shareholders—play a meaningful role in decision-making. This is evident in the development of alternative theories such as stakeholder theory and stewardship theory, which emphasize the need for a more inclusive and collaborative approach to corporate leadership. In this context, governance expands beyond managerial control to include mechanisms that foster effective collaboration with employees, local communities, and other interested entities.

Another important area of current research is the intersection between corporate governance and entrepreneurship. Gabrielsson (2017) highlights that in small and medium-sized enterprises, governance plays an active role in supporting growth and innovation. Integrating independent board members is particularly important for bringing expertise and facilitating access to external resources. Governance, in this view, is not only a control mechanism but also a facilitator of strategic development and innovation, providing essential support for entrepreneurial initiatives.

An additional major topic for future research is how governance structures can be adapted to function effectively across different cultural and economic contexts. In emerging economies, where regulatory frameworks are less developed and financial markets more volatile, traditional governance models may require significant adaptation. Informal networks and personal relationships play a crucial role in corporate functioning in such contexts, and governance systems must be sufficiently flexible and responsive to local conditions.

One particularly salient trend is board diversity, not only in terms of gender but also professional and cultural backgrounds. Research shows that diversity enhances the board's ability to make well-informed decisions by bringing a broader range of perspectives to strategic issues. Gabrielsson (2017) notes that diversity is essential for establishing board legitimacy in the eyes of external stakeholders, promoting transparency and accountability across a wide spectrum of interest groups.

As corporations face increasing pressure to adopt ethical and socially responsible practices, researchers are increasingly examining how boards can support the integration of sustainability into organizational strategy. In this context, corporate governance is no longer viewed solely as a financial oversight tool, but as a comprehensive mechanism for managing environmental and social risks and promoting responsible leadership in complex, interconnected environments.

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# Cybersecurity Readiness in Algeria: An Assessment of Infrastructure, Legislation, and Crisis Management

**Fatima DAHMANI**

PhD, Mohamed Boudiaf University– M'sila (Algerie)

E-mail: fatima.dahmani@univ-msila.dz

**Abderrezzaq BRADA**

PhD, Ahmed Zabana University– Relizane (Algerie)

Email: abderrezzaq.brada@univ-relizane.dz

**Abstract:** *This study offers a thorough examination of the leading international cybersecurity indicators, with particular emphasis on the National Cybersecurity Index (NCSI), in order to assess Algeria's cybersecurity preparedness. The primary objective is to evaluate the effectiveness of Algeria's cybersecurity measures, identify strengths, and highlight areas requiring improvement to ensure the robust and comprehensive protection of the national cyber infrastructure. Moreover, the rise of cybercrimes as an extension of traditional crimes presents new challenges, as these offenses are increasingly diverse and leverage advanced technological tools. Computers and smartphones, which serve as the primary instruments for committing these crimes, pose significant threats to the digital infrastructure of countries worldwide, Algeria included. The study's findings reveal that while Algeria has made notable strides in areas such as international cooperation and personal data protection, it continues to face significant challenges in securing digital services and managing cybercrimes. To enhance overall cybersecurity, it is crucial to focus on strengthening the security infrastructure and developing effective strategies to safeguard vital services and defensive capabilities.*

**Keywords:** *Cybercrime, Cybersecurity, NCSI, Infrastructure, Crisis Management.*

## 1. Introduction

The field of information transmission via the Internet stands as one of the most significant manifestations of modern technological progress, characterized by rapid and widespread expansion. According to a report issued by the United Nations Office (2015), the global number of Internet users has grown substantially since 2011, rising from 2.4 billion users to approximately 60% of the world's population, with the majority being in developing countries. This rapid expansion indicates that Internet access is no longer exclusive to developed nations; rather, its affordability has enabled widespread adoption, supported by the availability of computers, which are essential for engaging with the virtual domain. This technological advancement has given rise to a new spatial dimension for social interaction, commonly referred to as cyberspace, where individuals transcend physical and social boundaries. This realm represents a transitional phase for humanity, shifting from tangible reality to virtual experiences, resulting in profound transformations that have implications for Algeria's national security. Additionally, technology has introduced new concepts and social distinctions, such as the divide between those who are online versus offline, the distinction between the real and the virtual, as well as the material and immaterial.

In parallel, Algeria's digitization efforts in government institutions have introduced various concepts, such as digital quality, electronic services, digital transactions, digital identity, and digital literacy. The impact of digital transformation

within both the public and private sectors has significantly enhanced the country's digital infrastructure. As Algeria continues to increasingly integrate information technology into its institutional management processes and communication structures, both internally and externally, it is expected that the country will advance in global and regional rankings related to digital capability.

Conversely, cybersecurity has become an essential priority for safeguarding the digital infrastructure of the Algerian state, encompassing both its material assets and human resources. This necessity arises from the inherent vulnerabilities of cyberspace, which have given rise to cybercrimes. These offenses provide new avenues for criminals to exploit, utilizing the Internet to conduct activities such as hacking websites and personal accounts, committing fraud, manipulating sensitive information belonging to state institutions, and disseminating illicit content, all of which complicate efforts to detect and prosecute offenders (Brada, 2023:50).

Addressing Algeria's cybersecurity challenges requires a thorough examination and evaluation of its infrastructure, legal frameworks, and crisis management strategies, guided by the National Cybersecurity Index (NCSI). This study seeks to uncover the developments in Algeria's cyber and security infrastructure from 2016 to 2023, particularly in light of the ongoing digitization of both governmental and private entities, where traditional physical infrastructures are increasingly being replaced by interconnected digital systems. Ensuring the safe usage of the Internet has become a critical responsibility of the Ministry of National Defense, especially as the misuse of digital resources such as downloading files or accessing unsecured websites by individuals or institutions can expose them to cyberattacks or cybercrimes, often orchestrated by extremist groups.

Grounded on these considerations, the objective of our research is to evaluate Algeria's readiness to confront cyber threats. The study is structured to examine infrastructure, legislative measures, and crisis management capabilities, employing the National Cybersecurity Index (NCSI) as the analytical framework. This research endeavors to comprehensively address all relevant dimensions to answer the posed research questions and validate the proposed hypotheses. The study is organized as follows: Introduction, problem statement, research questions, conceptual framework, study methodology, field analysis, and concludes with findings and recommendations.

## **2. Research Problem and Questions**

Algeria has experienced rapid advancements in computer technology and electronic devices, which have profoundly transformed individual lives and led to fundamental shifts in institutional operations. Consequently, the use of personal devices such as computers and mobile phones has become indispensable, given their significance across various sectors and specializations. This trend is particularly evident in the economic, social, administrative, and security domains, where both institutions and individuals increasingly rely on electronic networks, including the Internet, computer systems, and digital information, for the storage of critical data (Brada, 2023:90).

In this evolving digital landscape, cyber threats have emerged as one of the most pressing risks facing the electronic networks utilized by institutions and individuals. These networks, alongside their human components, are frequently exposed to cyber threats, which are advancing at a pace that outstrips the capabilities of existing security systems. Between 2022 and 2023, over 4,600 cases of cybercrime were reported in Algeria, encompassing offenses such as blackmail, threats, defamation, and violations of personal freedoms via social media. Additional cyber offenses included the dissemination of false and misleading information, hacking, online harassment, and fraud. The

proportion of cases related to personal privacy ranged between 65% and 75% of the incidents addressed, as reported by the Algerian National Gendarmerie (Echorouk, 2023).

The rise of these crimes can be attributed to Algeria's ongoing digital transformation. Reports, such as the one published by We Are Social & Meltwater (2023), reveal that in 2023, there were approximately 32.09 million Internet users in Algeria, representing a penetration rate of 70.9%. Furthermore, the number of social media users reached 23.95 million, or 52.9% of the total population.

With the rapid expansion of digital technologies and the Internet's pervasive use across various fields, Algeria faces escalating challenges in bolstering its cybersecurity at multiple levels. These challenges necessitate a comprehensive evaluation of the country's readiness to confront cyberattacks and protect its digital infrastructure, thereby ensuring economic resilience and national security.

Thus, the central research question of this study is:

What is Algeria's level of preparedness in the field of cybersecurity? This inquiry further extends to identifying the critical elements that contribute to the comprehensive protection of digital infrastructure and assessing the effectiveness of the measures implemented to address escalating cyber threats.

## **2.1. Sub-Questions of the Study**

In alignment with the primary research question, the study seeks to answer the following specific questions:

1. What are the efforts undertaken by Algeria to enhance its cybersecurity infrastructure at the national level?
2. How can the effectiveness of Algerian legislation related to the protection of personal data, electronic signatures, and combating cybercrime be assessed?
3. To what extent does Algeria participate in international cooperation to combat cybercrime, and how does its involvement in global alliances impact national cybersecurity?
4. What capabilities does Algeria possess in responding to cyber incidents and managing crises, and what existing gaps require further attention?
5. What is Algeria's current level of protection for digital and essential services, and which areas need reinforcement to achieve comprehensive cybersecurity?

## **2.2. Study Objectives**

1. To analyze Algeria's efforts in advancing its cybersecurity infrastructure at the national level.
2. To explore the mechanisms used to evaluate the effectiveness of Algerian legislation concerning personal data protection, electronic signatures, and cybercrime prevention.
3. To assess Algeria's participation in international cooperation to combat cybercrime, with a focus on its contributions and the impact of global alliances.
4. To evaluate Algeria's capabilities in responding to cyber incidents and managing crises, identifying existing gaps.
5. To measure Algeria's level of protection for its digital and essential services, highlighting areas that require strengthening to ensure comprehensive cybersecurity.

## **3. Study Concepts**

### **3.1. Concept of Cybercrime**

Cybercrime refers to any criminal activity carried out using computers, networks, or electronic devices. This type of crime represents a sophisticated extension of traditional crimes, leveraging technological capabilities to commit offenses that surpass geographical and political boundaries. Cybercrime manifests in various forms,

including fraud, extortion, hacking, data theft, and defamation, as perpetrators exploit digital tools to reach their targets illicitly for material or moral gain (Salhi et al., 2024:123).

Moreover, cybercrime is characterized by its diversity in forms and the use of advanced digital tools. Computers and smartphones serve as primary instruments in committing these crimes, either as intermediaries that facilitate the crime or as direct targets. Cybercrimes pose significant challenges to contemporary societies due to the pervasive use of technology, making the tracking and apprehension of offenders increasingly complex (Murad et al., 2024:92).

### **3.2. Concept of Cybersecurity**

Cybersecurity is recognized as a branch of human security, emerging in response to the rapid advancements in information technology, particularly amidst the digital revolution impacting academic institutions. Ensuring cybersecurity has become an urgent necessity for these institutions to protect their digital assets and ensure operational continuity (Himoudi, 2023:174).

Cybersecurity also encompasses strategies to address vulnerabilities associated with Internet use, involving both technical and non-technical measures designed to safeguard the digital environment and sensitive data against potential threats (Al-Otaibi et al., 2020, p. 45). At its core, cybersecurity serves as a comprehensive framework to protect information networks and systems within institutions, particularly as digitization becomes integral to facilitating communication among personnel through networked computers. This includes the secure exchange of digital data, such as documents, images, and sensitive multimedia (Awfi, 2022:113).

### **3.3. Cybersecurity Needs**

The cybersecurity requirements of institutions vary depending on their specific sectors, whether economic, military, or educational. Consequently, specialized strategies must be developed to protect digital systems from cyber threats, focusing on three foundational elements:

- Planned Behavior: Institutions must implement security measures to protect their information systems and human resources. Key aspects include advancing digital transformation, adopting cybersecurity policies, and fostering awareness to mitigate cyber threats (Loukaka & Rahman, 2017:32).

- Deterrence: Effective deterrence involves imposing stringent penalties to curb illegal cyber activities. Notably, the "weakest link" often remains the human resource, as some cyber incidents arise from the irresponsible actions of authorized users. Therefore, monitoring internal behaviors is crucial to reducing potential risks (D'Arcy & Herath, 2011:55).

- Enhancing Motivation: Non-compliance with internal security policies by employees can lead to security breaches. Protecting digital systems thus necessitates encouraging employee adherence and increasing awareness of the importance of security measures in safeguarding the organization (Hsu & Shih, 2015:14).

### **3.4. National Cybersecurity Index (NCSI)**

The National Cybersecurity Index (NCSI) is a globally recognized benchmark used to evaluate the robustness of cybersecurity infrastructure across countries. Its primary goal is to prevent cyber threats and effectively manage cyber incidents, including attacks on national databases. The NCSI serves as a comprehensive repository of information on the cybersecurity posture of countries worldwide, enabling experts to

identify vulnerabilities that nations must address to enhance their cyber readiness. This, in turn, contributes to improving their positions in the Global Cybersecurity Index (Kravets, 2019:98).

#### **4. Study Methodology**

##### **A. Methodological Approach**

This study aims to evaluate the current state of cybersecurity in Algeria by identifying the strengths and areas for improvement necessary to ensure robust and comprehensive protection of the national cybersecurity framework. To achieve this objective, the research employed a descriptive approach, which involves collecting, analyzing, and interpreting data related to Algeria's performance on the National Cybersecurity Index (NCSI).

##### **B. Spatial and Temporal Boundaries**

- Spatial Boundaries: The study encompasses data specific to Algeria's cybersecurity infrastructure as assessed through the National Cybersecurity Index.

- Temporal Boundaries: The analysis is based on data collected from the NCSI covering the period from 2016 to 2023.

##### **C. Data Sources**

The primary data source for this study is the official database of the National Cybersecurity Index, which includes indicators aligned with Algeria's National Cybersecurity Framework. Complementary data were obtained from the National Center for Statistics and Information, ensuring a comprehensive and precise evaluation of Algeria's preparedness to counter cyber threats and manage associated incidents effectively.

##### **D. Statistical Methods Utilized**

The study employed descriptive statistical methods to analyze data extracted from the National Cybersecurity Index. This involved using point allocations and percentages to examine general trends related to Algeria's cybersecurity performance. The NCSI is structured into three main categories, comprising 12 capabilities and 49 indicators. The study focused on the following primary categories, with corresponding point allocations for each:

- 1.General Cybersecurity Indicators: Allocated 27 points.

- 2.Core Cybersecurity Indicators: Allocated 24 points.

- 3.Incident and Crisis Management Indicators: Allocated 26 points.

These categories collectively aim to provide a holistic evaluation of Algeria's cybersecurity readiness, offering insights into the country's ability to protect its digital infrastructure and respond to cyber incidents effectively.

## 5. Research Findings

### 5.1. Socio-Demographic Characteristics of the Algerian National Cybersecurity Index.

**Table 1– Socio-Demographic Characteristics of the Algerian National Cybersecurity Index**

Item	Details	Notes
Population	40.4 million people	//
Arab Rank	12th among Arab countries	//
Global Rank	104th globally according to the GCI 2020 index	//
Organizational Structure	Establishment of the Information Security Council	Presidential decree in 2020 to develop the national cybersecurity strategy.
International Cooperation	Member of CAMP, AfricaCERT, and FIRST	Participation in international alliances to combat cybercrime.
Data Protection Laws	Law No. 18-07 issued on June 10, 2018	Related to personal data protection and the establishment of a specialized authority for its protection.
Cyber Emergency Response Teams	DZ-CERT	Computer emergency response team for the protection of information systems in Algeria.
International Cybersecurity Rank	93rd out of 160 countries	According to the NCSI index.
Technology Development	Information technology development index at 47%	According to the United Nations technology report.
Academic Training	Programs in cybersecurity at the university level	Includes bachelor's and master's programs at educational institutions such as ESST and INSIM.
Legislation Against Cybercrime	Law No. 09-04 of 2009	Provides for combating cybercrime and supporting cyber gendarmerie teams.
Participation in Crisis Drills	Yes	Participation in international exercises for cybersecurity crisis management.
Digital Identification	Law No. 15-04 of 2015	Related to electronic signatures and documentation.

**Source:** Data presented in the table is sourced from the report by African Cybersecurity Organization (2021). *Indice de cybersécurité Algeria*. Retrieved from

<https://cybersecuritymag.africa/docs/Index-Cybers%C3%A9curit%C3%A9-Algerie.pdf>

The data presented in **(Table No 1)** highlight the socio-demographic aspects related to the Algerian National Cybersecurity Index, which offers a comprehensive overview of the status of Algeria's cybersecurity infrastructure. This index encompasses several critical factors that elucidate the nation's legal frameworks, international collaborations, and academic initiatives aimed at achieving national cybersecurity objectives.

The demographic profile of Algeria reveals a population of approximately 40.4 million, underscoring the scale of the local market and the cybersecurity challenges associated with a densely populated nation. Notably, Algeria ranks 12th among Arab countries and 100th globally in the Global Cybersecurity Index (GCI) for the year 2020, reflecting its cybersecurity landscape on both regional and international fronts.

From an institutional standpoint, the establishment of the Information Security Council by presidential decree in 2020 marks a significant step toward formulating a national cybersecurity strategy, underscoring the government's acknowledgment of the critical need to bolster cybersecurity through the development of effective policies and strategic frameworks.

Legislatively, Algeria enacted Law No. 18-07 on June 10, 2018, concerning the protection of personal data, signaling a governmental commitment to safeguarding information security. Additionally, the creation of an emergency response team to address cyber incidents indicates enhanced efforts to secure the national cyber infrastructure. However, despite these measures, Algeria's global ranking in cybersecurity has declined, standing at 100th out of 160 countries in the National Cyber Security Index (NCSI), highlighting the imperative to intensify efforts in this domain.

In relation to the Information Technology Development Index, Algeria has achieved a rate of 47%, as reported by the United Nations, signifying ongoing improvements in its digital infrastructure while indicating a need for further capacity enhancement. On the educational front, Algeria offers university-level academic programs in cybersecurity, such as the ESST and INSIM programs, reflecting the country's investment in training specialized human resources in this sector.

Regarding cybercrime legislation, Algeria has enacted Law No. 09-04 in 2009 to combat cybercrime, along with Law No. 15-04 in 2015, which addresses electronic signatures and digital documentation. These legislative developments illustrate Algeria's proactive approach to aligning with the growing digital landscape.

Lastly, Algeria's participation in international cybersecurity training initiatives underscores its level of preparedness and capacity to manage cyber crises, thereby enhancing its readiness to counter digital threats that could potentially compromise national security.

## **5.2. Algeria's Commitment to Enhancing Cybersecurity at National and International Levels.**

An analysis of the data presented in **(Table No 2)** reveals that Algeria demonstrates a robust commitment (100%) to strengthening cybersecurity both nationally and internationally. This commitment is clearly reflected in its active participation in global alliances such as CAMP, AfricaCERT, and FIRST, which focus on combating cybercrime. Within local neighborhoods, cybersecurity coverage reaches an impressive rate of 95%, while Algeria's participation in international cybercrime simulation exercises stands at 78%. In terms of adherence to legal frameworks related to electronic signatures, the compliance rate is 67%. Meanwhile, efforts toward the development of information and communication technology are currently at a rate of 47%.

**Table 2 – Algeria's Commitment to Enhancing Cybersecurity at National and International Levels**

Indicator	Percentage	Notes
Algeria's Participation in International Alliances	100%	Algeria is a member of international alliances such as CAMP, AfricaCERT, and FIRST to combat cybercrime.
Cybersecurity Coverage at Neighborhood Level	95%	Percentage of security coverage provided by national security for urban neighborhoods to protect citizens.
Development of Information and Communication Technology	47%	Technology development index in Algeria according to the United Nations report on information technology.
Compliance with Legal Frameworks for Electronic Signatures	67%	Percentage of compliance with electronic signature laws in Algeria according to international regulations.
Participation in International Cyber Crisis Drills	78%	Algeria participates in international exercises for managing cyber crises.

**Source:** Data presented in the table is sourced from the report by African Cybersecurity Organization (2021). *Indice de cybersécurité Algérie*. Retrieved from <https://cybersecuritymag.africa/docs/Index-Cybers%C3%A9curit%C3%A9-Algerie.pdf>

The analysis of **(Table No 2)** indicates that Algeria's main strategies for enhancing cybersecurity are centered on international collaboration and robust security coverage. The high percentages in these areas underscore the Algerian government's strong commitment to advancing cybersecurity on a global scale. This is evidenced by its membership in international coalitions like CAMP, AfricaCERT, and FIRST, along with its engagement in international exercises designed to manage cyber crises.

These figures also highlight the existence of a solid infrastructure and dedicated resources for cybersecurity at the local level, which reflects the effectiveness of measures implemented by national authorities to protect urban areas. This, in turn, enhances Algeria's capacity to respond efficiently to cyber threats and contributes to the country's overall security incident response capabilities.

However, the data also reveal significant disparities in other areas, such as the "development of information and communication technology" and "compliance with legal frameworks related to electronic signatures." The relatively lower percentages in these categories indicate a pressing need to intensify efforts in these domains. According to the National Cybersecurity Report, establishing a strong technological infrastructure is fundamental to any effective cybersecurity strategy. Thus, it is imperative to work on improving these areas to achieve sustainable progress.



Regarding legal compliance, the low rate in the area of electronic signatures highlights the need for legislative updates to align with global developments, particularly in relation to legal and technological standards, such as ISO certifications. Strengthening the legal framework supporting cybersecurity is crucial for ensuring the country remains aligned with international best practices.

In conclusion, while Algeria places considerable emphasis on bolstering its cybersecurity, especially through international cooperation and comprehensive security coverage, there remains an urgent need to focus on advancing information technology capabilities and enhancing compliance with legal standards. This should be part of an integrated strategy aimed at fortifying local cybersecurity capabilities and elevating Algeria's adherence to global standards, thereby solidifying its position in the international cybersecurity arena.

### 5.3. General cybersecurity indicators for Algeria.

**Table 3 – Presents the general cybersecurity indicators for Algeria.**

Indicator	Points	Percentage
Cyber security policy development	3 out of 7	43%
Cyber threat analysis and information	1 out of 5	20%
Education and professional development	4 out of 9	44%
Contribution to global cyber security	1 out of 6	17%
Total	9 out of 27	33%

**Source:** Data in the table is sourced from the report by National Cyber Security Index (NCSI) (2021). Algeria cyber security assessment report. E-Governance Academy. Retrieved from <https://ncsi.ega.ee>

An analysis of the data in **(Table No 03)** reveals that the general cybersecurity index for Algeria, reflecting overall performance in various areas related to cybersecurity, scored "9 out of 27" points, or 33%.

When examining the distribution of points across the basic indicators, it is evident that Algeria's performance varied across different areas. In the "Education and Professional Development" index, Algeria achieved "4 out of 9" points, or 44%, indicating tangible efforts to enhance the skills of workers in this sector. The "Cybersecurity Policy Development" index scored "3 out of 7" points, or 43%, signifying significant progress in formulating frameworks and policies that govern cybersecurity.

In contrast, Algeria's performance was lower in the "Cyberthreat and Information Analysis" index, with a score of "1 out of 5" points, or 20%, suggesting challenges in Algeria's ability to analyze digital threats and share security information effectively. Lastly, the "Global Cybersecurity Contribution" index scored "1 out of 6" points, or 17%, indicating the need to intensify efforts to contribute more to global initiatives aimed at combating cybercrime.

From the analysis of the data in Table (03) on cybersecurity indicators in Algeria, it is clear that the "Education and Professional Development" indicator is of paramount importance. This indicator plays a crucial role in preparing and training individuals to understand and apply cybersecurity principles and techniques, thereby contributing to the protection of sensitive systems and data from potential breaches. The growing interest in this field is in line with the global digital transformation. Therefore, strengthening academic and practical training programs to equip specialized personnel in cybersecurity is a vital element of a comprehensive strategy to achieve

national cybersecurity (Sipos, 2023:65).

In this context, Algeria has demonstrated a commitment to addressing the shortage of qualified cybersecurity specialists by developing educational and training programs. For instance, in 2020, the National Cybersecurity Center launched a training initiative targeting cybersecurity professionals to close the local skills gap and enhance the country's ability to tackle cyber threats.

The "Cybersecurity Policy Development" index ranked second, reflecting Algeria's moderate efforts in formulating a comprehensive cybersecurity policy. This policy aims to address the basic requirements for protecting assets and information from cyber risks, while ensuring the use of appropriate technologies to create a secure digital environment. In 2016, Algeria implemented a national cybersecurity strategy to protect critical infrastructure and improve national security. The strategy includes measures such as raising awareness of cyber threats, developing the necessary legal frameworks, and establishing a dedicated national cybersecurity center. However, additional improvements are required, including adopting further measures to ensure the effectiveness of these policies and enhance institutional capabilities in the face of growing digital challenges. Establishing a proactive cybersecurity framework is a critical component for ensuring digital security and stability at the national level (Menasri, 2023: 471).

The results indicated that the "Cyberthreat and Information Analysis" index in Algeria recorded a low score of 20%, reflecting a significant weakness in the country's ability to analyze cyber threats, such as information destruction, asset destruction, and network espionage. This highlights critical gaps in national capacities that require strengthening through the development of tools and resources for collecting and analyzing information on cyber threats. Algeria needs to invest in advanced techniques for cyber attack analysis and prediction to protect vital digital assets.

Lastly, the "Global Cybersecurity Contribution" index ranked last with a score of 17%, reflecting Algeria's limited contribution to international cybersecurity initiatives. To improve this index, Algeria must increase its participation in international partnerships and joint programs. For example, Algeria's involvement in initiatives like CYBER SOUTH 2017, aimed at strengthening institutional and legislative capacities to combat cybercrime in Southern Mediterranean countries, should be enhanced. Furthermore, Algeria is a member of the African Union Convention on the Protection of Personal Data and Cybersecurity, which seeks to improve cooperation among African nations in tackling cyber challenges. Strengthening Algeria's global cybersecurity contribution requires activating collaborative efforts and expanding participation in international projects, thereby enhancing its regional and global cybersecurity capabilities.

Overall, while Algeria has made significant strides in enhancing its cybersecurity capabilities, there remains an urgent need to further strengthen its specialized cybersecurity workforce, which will help fortify digital infrastructure and protect networks and information systems from the increasing threat of cyberattacks.

#### 5.4. Basic cybersecurity indicators for Algeria

**Table 4 – Presents the basic cybersecurity indicators for Algeria.**

Indicator	Points	Percentage
Protection of digital services	0 out of 5	00%
Protection of essential services	0 out of 6	00%
E-identification and trust services	6 out of 9	67%
Protection of personal data	4 out of 4	100%
Total	10 out of 24	42%

**Source:** Data in the table is sourced from the report by National Cyber Security Index (NCSI) (2021). Algeria cyber security assessment report. E-Governance Academy. Retrieved from <https://ncsi.ega.ee>

An analysis of the data in **(Table No 4)** reveals that the overall score for these indicators is 10 out of 24 points, corresponding to 42%. This analysis highlights Algeria's performance across each indicator in terms of both points and percentages.

The "Personal Data Protection" indicator achieved the highest performance, scoring 4 out of 4 points, or 100%, reflecting a clear commitment to safeguarding data privacy. This was followed by the "Electronic Identification and Trust Services" indicator, which scored 4 out of 9 points, or 67%, indicating a relatively advanced level in this domain, although further development is required to meet international standards.

In contrast, the "Digital Services Protection" and "Basic Services Protection" indicators both scored 0 points, with "0 out of 5" points and "0 out of 6" points, respectively, both equating to 0%. This low performance highlights significant gaps in the protection of these services, underscoring the need for enhanced efforts to develop strategies and allocate resources to these vital areas to ensure effective cybersecurity (Ben Daas & Ben Othman, 2022:1678).

From the analysis, it is evident that the "Personal Data Protection" indicator achieved a perfect score compared to the other indicators, reflecting the Algerian legislator's awareness of the importance of protecting personal data, which includes sensitive information about individuals' private lives, particularly in the context of the rapid digital transformation. This commitment was demonstrated through the establishment of a national authority for personal data protection, pursuant to Law No. 18-07, specifically in Articles 22, 23, 24, and 26, as a mechanism to enhance legal protection for individuals and mitigate risks related to data breaches or misuse. The "Electronic Identification and Trust Services" indicator, with a score of 67%, reflects Algeria's interest in electronic transactions, including contracts and digital signatures, to ensure the legal validity of these documents within the framework of the country's digital transformation. The Algerian legislator has acknowledged the need for electronic writing to be recognized under Article 323 bis of the Algerian Civil Code, which grants electronic evidence the same legal standing as paper-based evidence. Similarly, electronic signatures, regulated by Article 327, and electronic certification under Law 15-04, aim to foster a legal environment that supports the safe and reliable use of digital services (Jabai, 2017:492).

However, the "Protection of Digital Services" and "Protection of Basic Services" indicators both scored zero, highlighting a substantial gap in the legislative framework protecting these sectors. Despite the increasing integration of digital services into daily life, Algerian law has yet to adequately address them within the framework of

consumer protection laws (Law 18-09) or e-commerce regulations (Law 18-05). The absence of a specialized body for the protection of digital and basic services hinders Algeria's digital sovereignty and impedes the country's technological independence (Hazam, 2021:561).

Based on these results, it is clear that, despite progress in certain areas, Algeria must strengthen its legislative framework to ensure comprehensive protection of essential digital services. This will require integrated efforts, including the modernization of digital infrastructure and the development of public policies that align with international cybersecurity standards. These efforts are crucial to ensuring the continuity of economic and social development and safeguarding vital national assets.

### 5.5. Indicators for managing cyber incidents and crises in Algeria

**Table 5 – Presents the indicators for managing cyber incidents and crises in Algeria.**

Indicator	Points	Percentage
Cyber incidents response	3 out of 6	50%
Cyber crisis management	0 out of 5	00%
Fight against cybercrime	4 out of 9	44%
Military cyber operations	0 out of 6	00%
<b>Total</b>	<b>9 out of 26</b>	<b>35%</b>

**Source:** Data in the table is sourced from the report by National Cyber Security Index (NCSI) (2021). *Algeria cyber security assessment report*. E-Governance Academy. Retrieved from <https://ncsi.ega.ee>

The analysis of the data in **(Table No5)** reveals that the overall score for these indicators is 9 out of 26, which corresponds to 35%. Specifically, the "Cyber Incident Response" indicator achieved 3 out of 6 points, or 50%, reflecting an average capability in handling cyber incidents. The "Combating Cybercrime" indicator scored 4 out of 9 points, or 44%, indicating moderate efforts in addressing cybercrime. In contrast, both the "Cyber Crisis Management" and "Cyber Military Operations" indicators scored 0 out of 5 points and 0 out of 6 points, respectively, equating to 0%, suggesting significant gaps in preparedness and procedures related to cyber crisis management and military cyber operations in Algeria.

The data analysis underscores that the "Cyber Incident Response" indicator shows a relatively higher score, indicating a moderate ability to respond to such incidents. This result suggests that some measures are in place to counter certain cyber threats. Algeria has made efforts to protect its information systems by implementing various security agencies, particularly within the National Defense Institution. This aligns with global trends, where nations have revised their security policies to incorporate new mechanisms in response to cyber threats. Concurrently, Algeria has focused on developing its digital information technology infrastructure. However, given the increasing threats in the digital realm, there is a pressing need to enhance these efforts with legal and technological measures that can keep pace with rapid advancements in cyberattacks. Despite the existing efforts, this area still requires further improvements to ensure effective responses to various scenarios.

The "Combating Cybercrime" indicator reflects Algeria's moderate success in countering cybercrime. The country has experienced a sharp rise in cybercrimes targeting financial institutions and government agencies in recent years, leading the government to declare a state of alert. To bolster its capabilities, Algeria has trained over 24,000

engineers and technicians in cybersecurity. Furthermore, it has established the National Institute of Forensic Evidence and Criminology for the National Gendarmerie and the Central Service for Combating Cybercrime under the National Security Directorate. These initiatives aim to strengthen national capabilities in combating cybercrime and foster regional and international cooperation in addressing cybercrime and terrorist financing.

Regarding "Cyber Crisis Management" and "Cyber Military Operations," the lack of scores in both areas reflects insufficient preparedness and resources to address these challenges. This indicates a significant absence of comprehensive cybersecurity strategies, with no clear plan to address cybercrimes or to handle cyber threats effectively. Therefore, it is evident that Algeria needs to develop a robust, comprehensive strategy for managing cyber crises, coupled with widespread awareness of these issues across both social and professional sectors (Attia, 2019:100).

In the context of military cyber operations, the lack of readiness stems from the rapid technological advancements in the fields of the Internet and communications. Consequently, it is essential for Algerian security services to keep pace with these developments by acquiring and effectively utilizing modern technologies. This necessitates a focus on providing the necessary material and human resources to achieve cybersecurity across all domains.

In conclusion, the overall results from the table indicate that Algeria urgently needs to strengthen all aspects of cyber incident and crisis management, particularly in the areas of cyber crisis management and military cyber operations. Despite progress in incident response and cybercrime prevention, there is a clear need for improved cooperation between government and private institutions, the development of effective national strategies, and enhanced protection techniques to address cyber crises more effectively.

## 6. Conclusions

Upon analyzing the data from the tables and interpreting it both statistically and sociologically, which pertains to assessing Algeria's level of preparedness in the field of cybersecurity, the study evaluated the efforts made to develop cybersecurity infrastructure, legislation, and crisis management at the national level. This evaluation was conducted using the National Cybersecurity Index (NCSI), leading to the following findings:

1. **Algeria's Efforts in Developing Cybersecurity Infrastructure:** The findings indicate that Algeria has demonstrated a strong commitment to enhancing its cybersecurity infrastructure. This commitment is evidenced by the establishment of the Information Security Council in 2020 and the development of a comprehensive legal framework for personal data protection, as outlined by Law No. 07-18 of 2018, which governs and safeguards information flow within the digital sphere. However, Algeria's global ranking of 93rd on the NCSI highlights existing gaps that need to be addressed, necessitating additional efforts to improve infrastructure and bolster cybersecurity capabilities to achieve a more competitive international standing
2. **Effectiveness of Algerian Legislation on Personal Data Protection, Electronic Signatures, and Cybercrime Prevention:** The study revealed significant progress in Algeria's legal landscape for personal data protection, achieving a compliance rate of 100%. This accomplishment reflects a robust legal framework designed to safeguard individuals' rights in the information age. Nonetheless, it is crucial to raise public awareness and ensure effective enforcement of these laws to tackle data protection challenges. Regarding electronic signatures, the compliance rate

stood at 67%, signaling legislative advancements, though practical enforcement still requires refinement. Additional resources and efforts are needed to facilitate the widespread adoption of electronic signatures. As for Algeria's overall cybersecurity compliance rate of 44%, this indicates ongoing efforts yet also exposes gaps, such as insufficient technical expertise and weak intersectoral cooperation, necessitating increased investment in modern technology and comprehensive strategies to fortify cybersecurity.

3. **Algeria's Contribution to International Cooperation in Combating Cybercrime:** The study showed that Algeria achieved full participation (100%) in specific alliances like CAMP, Africa CERT, and FIRST, representing a positive step towards strengthening international collaboration in addressing cyber threats. However, a participation rate of only 17% in other global initiatives indicates challenges, particularly in raising awareness among decision-makers and stakeholders regarding the benefits of international cooperation, which is essential for enhancing Algeria's global cybersecurity presence.
4. **Algeria's Capabilities in Cyber Incident Response and Crisis Management:** The findings demonstrate that Algeria's ability to respond to cyber incidents is moderate, with a readiness level of 50%, indicating partial preparedness in this area. There is a need to enhance strategies for early threat detection and rapid response. However, Algeria recorded zero points in cyber crisis management and military cyber operations, highlighting deficiencies in defensive capabilities. This shortfall could expose the nation to risks, particularly given regional and international conflicts, thus necessitating the development of military cyber strategies to strengthen national defense.
5. **Algeria's Protection of Digital and Critical Services:** The study revealed that Algeria attained a 100% compliance rate in personal data protection, reflecting a clear commitment to safeguarding sensitive information through effective legislation and mechanisms. The country also performed well in the domains of electronic identification and trust services (67%), such as digital signatures and multi-factor authentication, which enhance the security of electronic transactions. However, a score of 0% in the protection of digital and critical services suggests significant vulnerabilities in the digital infrastructure supporting economic services, making them susceptible to cyber threats. Comprehensive measures are required to bolster the protection of these services, which form a crucial foundation for both national and cybersecurity.

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# The Historical Transformation of the Relationship Between Public Administration and Civil Society: From Authority to Dialogue

Dan ARDELEAN

Independent researcher, Bucharest (Romania)

Email: ardelean\_dan@yahoo.com

**Abstract:** *This study investigates the historical evolution of the relationship between public administration and civil society through a diachronic lens, focusing on the transformations in institutional configurations, normative frameworks, and citizen-state interactions. Rather than examining administrative structures as merely technical systems, the analysis approaches them as historically embedded expressions of authority, legitimacy, and mediation. In the first stage, administration functioned as an extension of sovereign will in authoritarian and patrimonial regimes, devoid of legal predictability or civic engagement. The second stage reflects the rationalization of administration during the formation of the modern state, characterized by codified law, bureaucratic professionalism, and the gradual emergence of legal and procedural spaces for interaction with civil society. In the third stage, participatory governance reshapes administrative functioning through mechanisms of deliberation, transparency, and accountability, transforming the citizen from a regulated subject into an active interlocutor in public decision-making. The inquiry reveals that the administration–society nexus does not evolve in a linear manner but follows discontinuous paths, marked by tensions between continuity and rupture, hierarchy and collaboration, command and negotiation. The trajectory of these transformations delineates a shifting grammar of power and inclusion, with the modern administrative apparatus situated at the intersection of institutional reflexivity and societal pluralism.*

**Keywords:** *state modernization; public administration; civil society; participatory governance; authority structures.*

## 1. Introduction

The relationship between public administration and civil society constitutes a field of analysis that has generated a wide range of theoretical perspectives and historical interpretations rooted in various paradigms of the state and governance. The way administrative institutions have positioned themselves in relation to citizens reflects a genealogy of authority, marked by alternations between domination, mediation, and participation. This trajectory cannot be understood outside a broader context in which political, economic, and cultural transformations have continuously reshaped the forms of legitimation and functioning of the administrative apparatus. Far from being a mere technical mechanism, public administration is imbued with meanings that place it at the core of state-building processes and the evolving relations between state and society.

In classical political theory, public administration has often been associated with the exercise of power by an institutionalized center, perceived as external to the communities it governed, imposing norms and enforcing constraints. This view is evident in the works of Max Weber, who defined modern bureaucratic administration as a rational-legal apparatus, autonomous from social groups, yet dependent on a clearly delineated hierarchy and impersonal rules (Weber, 1978). The concepts of rationality and legality solidified the image of an efficient yet distant administration, governed by pre-established norms and a culture of institutional conformity.

As theories of governance and participatory democracy gained ground, the understanding of administration underwent significant changes. According to Pierre

Rosanvallon, for instance, the state can only be analyzed in relation to the forms of expression developed by civil society, as well as the mechanisms of contestation, oversight, and deliberation surrounding it (Rosanvallon, 2006). In this light, administration no longer appears as a sealed-off body, but rather as a network of interactions, competing legitimacies, and regulatory mechanisms situated between authority and collective actors.

This study proposes an inquiry into the historical transformations of this relationship, through a stratified interpretation of the major stages traversed by the dynamic between public administration and civil society. The analysis will cover institutional domination characteristic of authoritarian regimes, the transition toward a modern bureaucratic model, and, finally, the emergence of mechanisms for institutional dialogue and civic participation. This approach involves a contextualization of administrative forms within the logic of their respective historical epochs, along with a reflection on the political, cultural, and social meanings embedded in the interaction between state and citizens.

## **2. Stage I: Public Administration in Authoritarian and Premodern Regimes**

The administration of public affairs within premodern and authoritarian state formations bore the imprint of institutional structures dominated by the logic of centralized power and a radical disjunction between the governing authority and the communities subject to its rule. The administrative configurations of these historical periods cannot be reduced to mere technical-executive functions, as they constituted mechanisms of legitimation, instruments for the reproduction of domination, and frameworks for safeguarding a social order defined by ruling elites. The authoritarian nature of such regimes was not limited to the absence of civic participation, but extended to the articulation of a juridico-administrative order that excluded any instance external to the will of the sovereign or the narrow circle surrounding him from decision-making.

In the Western European context, absolutist monarchies provide a revealing example of an administration exclusively dependent on royal will, perceived as deriving from divine origin rather than a social contract or collective recognition. In seventeenth-century France, the royal administrative system was organized according to a rigid verticality, wherein local officials—known as *intendants*—exercised control, judicial, and fiscal functions in the king's name, without the mediation of social or territorial representation (Kettering, 1986). This structure not only disciplined space through centralization but also excluded collective deliberation from the administrative sphere, which was viewed as a potential interference with sovereign authority.

In the Ottoman Empire, the patrimonial character of the administration was reflected in the conflation of the state apparatus with the personal domain of the sultan. Ottoman officials did not manage public goods in the modern sense but administered resources as an extension of imperial authority, within a system in which personal loyalty, ethnic background, and religious affiliation were decisive in the appointment and retention of administrative positions (İnalçık, 1973). Such a model did not give rise to an autonomous administrative body but rather to a network of clientelist relationships centered around the imperial court, designed to maintain political continuity in the absence of any constitutional demarcation of the relationship between rulers and subjects.

In Central and Eastern Europe, administrative configurations oscillated between Western influences and autocratic structures of Byzantine or Ottoman origin. The administrative systems of the Romanian principalities during the Phanariot and pre-Phanariot periods were marked by excessive personalization of public office, where appointments were not made based on competence or procedural norms but rather on

proximity to the prince, proven loyalty, or the financial capacity to secure such a position (Giurescu, 1971). In this way, administration became a vehicle for negotiating influence between local centers of power and central authority, with no clear boundary between public interest and private gain.

A persistent feature of these regimes was the absence of the citizen as a subject of administrative processes. The individual did not appear as a participant or as a beneficiary of public services in the sense conceptualized in modernity. The relationship between the state and individuals took the form of unilateral domination, legitimized religiously, militarily, or through dynastic continuity, depending on the nature of the regime. Frequently, administration served primarily as an instrument for tax collection and coercive enforcement, with citizen-state interaction reduced to vertical relations in which authority commanded and subjects obeyed, without any recourse to principles of fairness, transparency, or efficiency.

The notions of sovereignty and representation did not enter the administrative vocabulary of premodern systems, except in a symbolic or ceremonial manner. Even where proto-parliamentary or consultative bodies existed, they rarely exerted real deliberative influence on administrative operations, serving instead as instruments of ceremonial consent. In such contexts, administration did not function as a site of social interaction but as an expression of political will elevated above the social body, legitimized by tradition, divine sanction, or sheer force.

The juridico-political discourse of the time, where formulated, did not conceptualize administration as a public service but rather as an expression of natural order, divine peace, or monarchical wisdom. In medieval and premodern political thought, administrative law as an autonomous discipline was absent, and the rules governing administrative function were established through decrees, customary practices, or discretionary decisions, lacking a uniform legal basis applicable equally to all subjects. This absence of legal predictability and normative formalization reinforced a deeply asymmetrical relationship between administration and the population.

Accordingly, public administration in authoritarian and premodern eras did not operate as an impersonal, regulated system, but as an extension of the ruler's will, mediated through networks of loyalty, privilege, and institutionalized violence. Interaction with society remained limited, fragmented, and often conflictual, since administration was not conceived as a space for dialogue or cooperation, but as an apparatus of imposition and control. These features had a lasting influence on the subsequent development of modern administrative thought and on the reconfiguration of the relationship between administration and the citizen.

### **3. Stage II: The Modernization of the State and the Beginnings of Interaction with Civil Society**

The process of state modernization generated a reconstruction of public institutions and of the relationships between those institutions and society, against the backdrop of the emerging nation-state, the affirmation of individual rights, and the redefinition of political legitimacy. In this dynamic, public administration did not develop solely as a technical instrument for policy implementation, but acquired a structural role in articulating social cohesion, mediating between particular interests and general will, and establishing a rationalized authority capable of being formalized and subjected to legal scrutiny. Administrative modernization implied more than the adoption of bureaucratic forms; it presupposed the configuration of a new type of relationship between the state and the citizen, articulated around legality, neutrality, and the professionalization of public service.

This historical stage unfolded in the context of structural transformations that reshaped the architecture of the European state, beginning with the French Revolution and continuing with the development of liberal constitutionalism. During this period, the idea of impersonal and rational administration began to take shape, standing in contrast to the premodern model characterized by personalization, clientelism, and functional instability. Max Weber offered an analytical framework through which modern administration was defined as a hierarchical organization governed by written rules, clearly delineated competencies, and an ethic of neutrality, where civil servants are selected based on merit and their loyalty is oriented toward institutions rather than individuals (Weber, 1978). This conceptualization significantly influenced subsequent administrative thought, offering an ideal-type that became a reference point for the construction of the modern state.

Modernization did not unfold in a uniform manner; it was marked by significant differences across geographical spaces and political traditions. In France, administrative centralism consolidated through prefectures and a deeply integrated system of state control, whereas in Germany the Prussian tradition emphasized strict professionalization of the civil service and a clear distinction between political and technical administration (Derlien, 2003). In Britain, the common law tradition and the absence of a revolutionary rupture favored a gradual development in which administration evolved alongside the expansion of civil rights and the emergence of an active civil society, without assuming a strictly bureaucratic model.

Legally, the modern state began to define its competencies and boundaries through positive law, which entailed the codification of administrative domains and the creation of legal control mechanisms. Administrative law acquired the status of an autonomous discipline, and judicial institutions began to play an active role in overseeing the legality of administrative acts. This legal structuring of the relationship between state and citizen laid the groundwork for a regulated interaction, in which society was no longer excluded from administrative action but could intervene within the pre-established framework of litigation and procedural rights.

Civil society, in the meaning it acquired during this period, was not defined solely as a space of resistance to the state, but as a structure of mediation between the citizen and authority, between individual liberty and institutional order. Tocqueville described this intermediary function through the example of voluntary associations as forms of social self-organization capable of limiting authority and balancing administrative centralism with civic participation (Tocqueville, 2000). This type of civil society became increasingly visible in the public sphere, especially through the press, trade unions, professional associations, and early social movements. In this context, public administration was compelled to redefine its relationship with social actors, to accept indirect forms of interaction, and to gradually integrate mechanisms of consultation and adjustment in response to societal dynamics.

This reconfiguration of the administration–society relationship was also reflected in internal changes within the administrative apparatus. The civil servant was no longer perceived as an agent of discretionary power but as a professional with a specific role in implementing the law and maintaining institutional equilibrium. The emergence of schools of public administration, such as the *École libre des sciences politiques* (later Sciences Po) in France, marked the beginning of the professionalization of the civil service, orienting it toward standards of competence and public ethics (Suleiman, 2003). This professionalization contributed to the consolidation of an administrative culture grounded in rationality, efficiency, and predictability, while also fostering the emergence of a relatively autonomous bureaucratic body that began to operate according to its own

logic, somewhat distinct from the political cycle.

In the Romanian context, the process of administrative modernization followed a trajectory marked by discontinuities and selective adaptation of the Western model. The Organic Regulations introduced the first elements of modern administrative organization, while the reform of 1864 under Alexandru Ioan Cuza and the 1883 Public Administration Law consolidated a hierarchical and centralized structure, in which the civil servant was subordinated to central authority but began to acquire a professional status (Murgescu, 2010). This process was accompanied by legislative modernization but also by the persistence of clientelist practices and administrative instability, which hindered the consolidation of a coherent bureaucratic model.

During this stage, the interaction between administration and civil society took intermediate forms, marked by the emergence of indirect communication channels, the institutional development of legal oversight, and the initiation of a rights-based political culture. These forms did not entail direct citizen participation in decision-making, but allowed for social responses to administrative actions and the assertion of demands for responsibility and fairness in the relationship between rulers and the ruled. At the same time, these transformations generated new tensions between the ideal of impersonal administration and the social realities marked by inequality, exclusion, and structural limitations in access to power.

This historical stage did not feature a rigid separation between state and society but rather a process of mutual adjustment and reciprocal regulation, in which public administration gradually assumed the role of an actor aware of its function in maintaining social cohesion and articulating the general interest. In this process, modernization meant not only technical efficiency but also the development of mechanisms through which the citizen was recognized as a rights-bearing subject and administration as a domain subject to legal control and normative evaluation.

#### **4. Stage III: From the Welfare State to Participatory Governance**

The transformations that took place in the structure and functioning of public administration during the second half of the twentieth century led to a significant reconfiguration of the relationship between state institutions and civil society. This evolution unfolded within a context in which the welfare state, built around the ideas of redistribution and social protection, gradually redefined its missions in response to the demands of democratic pluralism and public participation. The shift in paradigm did not occur through an abrupt replacement of existing structures but emerged through a slow, layered process marked by contradictions, adjustments, and tensions between the traditional administrative logic, focused on legality, and the imperatives of an open governance model based on cooperation, accountability, and interaction.

In the postwar period, the consolidation of the welfare state brought about an expansion of administrative responsibilities in fields such as education, health, social housing, pensions, and labor protection. This extension of administrative functions was accompanied by the significant growth of the bureaucratic apparatus and an intensified interventionist role of the state in both the economy and society. The Weberian model of administration, centered on formal rationality, hierarchy, and legality, remained dominant, but increasing political and social pressures called for a democratization of decision-making processes and a reduction in the distance between authorities and citizens (Offe, 1984).

From the 1970s onward, the emergence of social movements that questioned the efficiency, opacity, and rigidity of state administration raised concerns about the model's

capacity to address growing demands for inclusion, transparency, and adaptability. Economic crises, the process of globalization, and the ascent of neoliberal ideologies gradually reshaped the role of the state through the transfer of certain responsibilities to the private sector, reductions in public spending, and the promotion of management practices borrowed from the corporate sphere (Hood, 1991). In this context, the notion of governance began to be used to describe a mode of steering that involved multiple actors—public and private, formal and informal—in decision-making processes that were distributed, negotiated, and open to society.

Participatory governance emerged as a response to the limitations of unilateral government and as an expression of a new vision of the relationship between administration and society, one in which the emphasis shifted from legality and efficiency to cooperation, inclusion, and deliberation. Public administration began to implement mechanisms such as public consultations, deliberative forums, participatory budgeting, advisory councils, and digital platforms that enabled citizens to contribute to the design of public policies, monitor services, and evaluate administrative decisions. These processes did not alter the hierarchical structure of administration in a radical way but introduced new channels of communication and influence, thereby shaping a network of multiple relationships characterized by interdependence, shared responsibility, and overlapping competencies (Pierre & Peters, 2000).

This phase also witnessed an intensified discourse around administrative transparency, alongside the development of regulations on access to public information and data protection. The concept of administrative accountability was no longer limited to judicial control but expanded to include public evaluation, civic auditing, and social monitoring, involving citizens in overseeing the actions of the state. Public institutions were compelled to reconsider their stance toward organized civil society, gradually recognizing the role of NGOs, trade unions, community networks, and civic initiative groups as dialogue partners rather than passive recipients of administrative decisions.

In many European countries, administrative reform was closely tied to the process of European integration, which required the adoption of standards related to transparency, accountability, and public dialogue, while also promoting multilevel governance and cooperation among local, regional, and national administrations. At the same time, the digitalization of public services reconfigured the space of interaction between the state and the citizen by establishing online platforms, service portals, and electronic participation mechanisms that altered both the temporal dynamics and accessibility of administrative processes. These tools did not replace the traditional functioning of administration but introduced a new logic of proximity and responsiveness, within which the citizen assumed the role of active user and interlocutor in the design and assessment of public policy (Chadwick, 2006).

In the field of administrative theory, the concept of the network gradually replaced that of hierarchy, and public servants were no longer seen solely as executors of political will or guarantors of legality. They came to be understood as mediators between diverse social interests, facilitators of dialogue, and managers of participatory processes. This transformation was supported by a reconfiguration of professional training in administration, which incorporated modules on public ethics, institutional communication, negotiation, conflict resolution, and community engagement. A reflective model of administration began to take shape, one capable of adapting its procedures and tools to social expectations and to the dynamics of a pluralistic political and cultural environment.

In Romania, the transition from a centralized etatist state to a participatory governance model was fragmented and marked by structural imbalances. Although post-

1990 legislation enshrined the principles of transparency, public participation, and decentralization, implementation was often limited by institutional resistance, a fragile administrative culture, and a weak capacity of civil society to act as a consistent and credible partner in governance processes. The laws on access to public information (Law no. 544/2001) and on decisional transparency (Law no. 52/2003) created a favorable normative framework for participation, yet the effective use of these mechanisms remained uneven, both due to limited civic initiative and to the bureaucratic formalism of public institutions (Zamfir & Stan, 2010).

Within this context, a persistent tension can be observed between the participatory model promoted by institutional discourse and the actual practice of administration, which oscillates between openness and opacity, between symbolic collaboration and the marginalization of civil society actors. The dynamics of participatory governance cannot be isolated from broader social configurations, civic capital, and the institutional resources available in each national context. The analysis of this stage must therefore account for both the structural changes occurring within administration and the cultural, political, and economic constraints shaping society's capacity to become an effective partner in public decision-making.

## 5. Conclusions

The analysis of the historical evolution of the relationship between public administration and civil society requires a stratified reading of legitimacy structures, types of authority, and institutional transformations that have shaped this relationship across different historical periods. Changes in administrative organization cannot be reduced to technical adjustments, as they reflect deeper patterns of power representation, public space configuration, and the delineation of the citizen's position vis-à-vis the bureaucratic apparatus. In each stage, the relationship between administration and society has been structured by a symbolic and normative architecture that defined the boundaries between submission, participation, and contestation.

In authoritarian and premodern regimes, the configuration of administration was constructed around the notion of a singular, insurmountable will, expressed through a sovereign authority whose legitimacy derived from genealogy, sacrality, or force. In this stage, the citizen was not recognized as a legal subject, and administrative institutions operated as extensions of centralized authority, without separating the personal will of the ruler from institutional action. Administration was not subjected to a legal order in the modern sense of the term, but functioned on the basis of fluid, often unwritten rules, consolidated through tradition, obedience, and networks of loyalty. The absence of a clear distinction between public and private interest placed administration in a zone of normative indistinction, where public function was not separated from patrimonial logic.

The modernization of the state brought a paradigm shift marked by the affirmation of legality, the institutionalization of the meritocratic principle, and the imposition of procedural frameworks for administrative action. Administration became a space organized around formal rationality, where the exercise of power was legitimized through compliance with general rules and the clear delineation of competencies. The professionalization of public service generated not only an increase in bureaucratic efficiency but also a redefinition of the relationship with the citizen, who began to emerge as a regulated subject, bearer of rights, and participant in mechanisms of authority oversight. Civil society, during this stage, evolved as an interface between state and individual, circulating ideas, demands, and mechanisms through which authority was compelled to reformulate its boundaries and accept a form of normative dialogue.

The transition toward the stage of participatory governance did not represent a mere continuation of modernization but rather a shift in the nature of the relationship between administration and the citizen. The bureaucratic apparatus faced multiple pressures, both from democratic discourses that demanded openness in administrative decision-making and from managerial theories that imposed standards of efficiency, performance, and responsiveness. Within this context, administration could no longer operate exclusively within the closed confines of formal legality but was called upon to become responsive to societal initiatives, accept social oversight, and adapt to new technologies of transparency. Participation extended beyond symbolic consultation and entailed the establishment of stable channels for deliberation, negotiation, and joint formulation of decisions.

These transformations did not lead to the dissolution of institutional boundaries but to their reformulation within a logic of interdependence and distributed responsibility. Administration was compelled to adopt a reflexive role, to incorporate mechanisms of external evaluation into its structure, and to become attentive to the cultural, social, and political variables that influence perceptions of legitimacy. Within this framework, the citizen was no longer defined solely through legal belonging to a political body but also through the ability to participate in the co-production of norms and policies that affect them. Civil society functioned as a laboratory of critique, innovation, and testing of new models of interaction between power and collectivity.

The relationship between administration and society did not follow a linear or cumulative trajectory, but experienced ruptures, regressions, and contextual adaptations. Each historical stage was traversed by tensions between institutionalized forms of authority and the dynamics of social change, between hierarchical logic and demands for participation, between the preservation of the status quo and the claims of pluralism. These tensions produced hybrid models—forms of cohabitation between old and new, between verticality and network, between command and cooperation. Contemporary administration stands at the intersection of these traditions and models, within a space where the state form is continuously contested and renegotiated through new types of social interaction and through the constant redefinition of the boundaries between public and private, between authority and autonomy.

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# Optimizing Assistive Interventions for the Psychosocial Development of Students With Special Educational Needs (SEN)

**Oana-Maria RĂDULESCU**

PhD Student, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: oanamaria2409@gmail.com

**Abstract:** *This article explores strategies for optimizing assistive procedures that support the psychosocial development of students with special educational needs (SEN) in the context of inclusive education. Starting from the imperative of equity and active participation in the school environment, the paper analyzes assistive interventions implemented in mainstream schools, with a focus on their formative and integrative value. An interdisciplinary approach is proposed, in which collaboration among teachers, specialists from multidisciplinary teams, families, and the broader community contributes to creating a flexible and adaptive educational framework. The article highlights the role of assistive procedures—such as curricular adaptations, assistive technologies, and personalized counseling—in enhancing autonomy, self-esteem, and social interaction among students with SEN. Based on theoretical analysis and examples of best practices, the study outlines directions for improving educational intervention and emphasizes the importance of ongoing professional development in the field of inclusive education.*

**Keywords:** special educational needs' assistive procedures; psychosocial development; inclusion; educational intervention; social equity.

## 1. Introduction

In recent decades, educational inclusion has become a fundamental priority in modern education systems, requiring a profound reconfiguration of pedagogical practices and the forms of support provided to students with special educational needs (SEN). The concept of inclusion goes beyond the mere physical integration of these students into mainstream schools, involving a holistic approach centered on individual needs, personal and social development, and active, equitable participation in school life (Ainscow, 2008).

In this context, assistive procedures represent essential tools for supporting the psychosocial progress of students with SEN, facilitating both access to education and the development of autonomy, interpersonal relationships, and adaptive social behaviors. These procedures encompass a wide range of interventions—from curricular adaptations and assistive technologies to psycho-pedagogical counseling and relational mediation strategies—all grounded in the assessment of individual needs and in collaboration among all stakeholders: teachers, specialists, parents, and classmates (Gherguț, 2011).

Inclusive education implies not only methodological changes, but also a shift in the sociological paradigm concerning difference. The student with SEN should not be viewed as "deficient" or "problematic," but rather as a bearer of diversity that can enrich the collective learning experience. From this perspective, psychosocial development is not a secondary by-product of education but a fundamental dimension of school success and social inclusion (Florian & Black-Hawkins, 2011; Bronfenbrenner, 1979).

## 2. Theoretical and Legislative Foundations

Understanding the complexity of assistive intervention for students with special educational needs (SEN) requires both a solid theoretical foundation and a clear reference to the relevant legislative framework. From a theoretical perspective, inclusive education

is grounded in the principles of equity, diversity, and active participation, which are rooted in constructivist and socio-cultural paradigms. According to Vygotsky (1978), a child's cognitive and social development is closely linked to interactions with the environment and with others, emphasizing the need for an educational setting that supports social interaction and collaborative learning (Lev Semenovich Vygotsky, 1979).

The ecological model of human development, proposed by Bronfenbrenner (1979), offers a systemic understanding of the multiple influences affecting a child's evolution, including family, school, and community. This model supports the idea of multidimensional intervention, where assistive procedures must be tailored to the student's specific context and take into account the interdependence of factors in their environment (Bronfenbrenner, 1979).

On a legislative level, Romania has adopted a series of measures to promote inclusive education. **The National Education Law no. 198/2023**, with subsequent amendments, acknowledges the right to education for all children, including those with SEN, and establishes the principle of educating students in mainstream schools whenever possible. Furthermore, **Ministerial Order no. 6134/2016** regulates the organization of educational support services for students with SEN, providing measures such as curricular adaptation, the use of assistive technologies, psycho-pedagogical counseling, and collaboration with specialists (National Education Law no. 98/2023; Ministerial Order no. 6134/2016).

Internationally, Romania is a signatory to the **United Nations Convention on the Rights of Persons with Disabilities**, ratified by **Law no. 221/2010**, which obligates the state to ensure an inclusive and accessible educational system at all levels, in accordance with the individual needs of students. These documents constitute the legal foundation for assistive procedures and outline essential directions for their optimization, aiming at an equitable education focused on the psychosocial development of each child (Law no. 221/2010).

### 3. Assistive Procedures Used in Inclusive Education

In inclusive schools, assistive interventions aim to ensure equitable access to quality education for students with special educational needs (SEN), in conditions that respect their individual characteristics and fundamental rights. Assistive procedures are not standardized, but must be tailored to the type of disability, the student's learning style, the school context, and the resources available (Florian & Black-Hawkins, 2011).

One of the most widely used interventions is **curricular adaptation**, which involves modifying content, structure, pacing, or teaching methods to meet specific student needs. This may include simplifying assignments, incorporating visual materials, allowing extended time for tasks, or rephrasing instructions in accessible language. The goal is to enable students with SEN to engage functionally in the educational process while remaining integrated within the mainstream classroom (Gherguț, 2011).

**Assistive technologies** form another crucial pillar of intervention. These include tools such as speech synthesizers, educational apps, adapted tablets, sound amplification devices, or software to support reading and writing. The use of such technologies helps compensate for sensory or motor impairments and encourages student autonomy (Dell, Newton & Petroff, 2017).

The **support teacher** plays an essential role in implementing assistive procedures, working alongside the classroom teacher to personalize instruction. Their interventions range from observing student behavior and assessing developmental levels to designing and monitoring the implementation of a personalized intervention plan (PIP) (Suciu, 2020).

At the same time, **psycho-pedagogical counseling** supports the socio-emotional development of students with SEN, helping to reduce the risk of isolation or stigmatization. Counseling activities may include role-playing, self-awareness exercises, emotional regulation strategies, and conflict mediation (Răducu, 2021).

Lastly, the **involvement of classmates** in the educational process and the promotion of empathy contribute to creating a positive and inclusive classroom climate. Strategies such as peer tutoring, cooperative learning, or group projects foster social integration and strengthen interpersonal relationships (Booth & Ainscow, 2011).

Thus, the assistive procedures used in inclusive schools go beyond mere pedagogical adaptations—they reflect an educational philosophy centered on the learner, on diversity, and on each student's right to full psychosocial development.

#### **4. Optimizing Assistive Intervention: Directions and Solutions**

Optimizing assistive intervention in inclusive schools involves moving away from a standardized approach toward a flexible model centered on the real and constantly evolving needs of students with special educational needs (SEN). Effective assistive support must be individualized, coherent, collaborative, and sustained by an inclusive school culture.

##### **Assessing Needs and Personalizing Support**

A key step in the optimization process is conducting a comprehensive and ongoing assessment of educational needs—not limited to medical diagnosis, but also considering the school environment, family context, and the student's adaptive capacity. The **Personalized Intervention Plan (PIP)** must be regularly reviewed and developed collaboratively by the classroom teacher, parents, school counselor, and specialized staff (Gherguț, 2011; Suci, 2020).

##### **Interinstitutional Collaboration and Multidisciplinary Teams**

Effective intervention requires the presence of a **functional multidisciplinary team**, including teachers, psychologists, speech therapists, social workers, and other professionals. Communication among these actors must be continuous and well-structured to ensure the coherence of applied strategies (Răducu, 2021). Moreover, partnerships with local social services, county school counseling centers (CJRAE/CMBRAE), and relevant NGOs can expand the resources available to support students.

##### **Continuous Professional Development for Teachers**

Teachers must receive **ongoing training** in inclusive education, classroom management for diverse groups, the use of assistive technologies, and curriculum adaptation. Research shows that the success of assistive interventions strongly depends on the attitudes, skills, and commitment of teaching staff (Florian & Rouse, 2009).

##### **Integrating Technology and Digital Resources**

The use of **accessible digital resources and modern assistive technologies** enables the customization of learning content, supports alternative communication, and enhances student autonomy. It is essential that such tools be chosen according to each student's specific needs and be accompanied by appropriate training (Dell, Newton & Petroff, 2017).

##### **Family and Community Involvement**

Families must be considered **active partners** in education, not merely recipients of information. Their involvement improves the effectiveness of interventions, reduces student anxiety, and ensures continuity between the home and school environments. The local community can also support inclusion through volunteering, awareness campaigns,

and collaborative educational initiatives (Mitchell, 2014).

### **Monitoring and Evaluating Progress**

Finally, assistive procedures must be accompanied by **clear mechanisms for monitoring and evaluating** both the psychosocial and academic progress of the student. These may include observation sheets, monthly reports, educational portfolios, and self-assessments, all aimed at continually adjusting the intervention strategy (Booth & Ainscow, 2011).

In conclusion, optimizing assistive intervention is not about applying fixed methods, but rather engaging in a continuous process of adaptation, cooperation, and training focused on the harmonious development of each student with SEN within the school and social environment.

## **5. Case Study: Using Assistive Technology to Support a Student with Dyslexia Educational Context**

E.A. is a fourth-grade student enrolled in a mainstream school in an urban area, diagnosed with dyslexia based on an evaluation conducted by a specialist physician. At the beginning of the primary education cycle, his main challenges included: slow and hesitant reading, omissions and reversals of letters, partial understanding of texts, and low self-esteem related to academic performance.

### **Assistive Intervention**

Following consultations with the multidisciplinary team (support teacher, classroom teacher, school counselor, and speech therapist), a decision was made to integrate a specific assistive technology into the student's daily learning routine: a **reader pen**—a device that scans and reads printed text aloud. This tool supports both decoding and real-time comprehension of texts (Dell, Newton & Petroff, 2017).

The pen was introduced gradually to avoid stigmatization and was used during both independent reading and Romanian language classes. The student was taught to use the device independently, and classmates were discreetly informed of its assistive purpose.

In addition to this technological support, several **complementary measures** were implemented:

- **Curricular adaptations:** shorter texts, simplified task instructions, and a focus on understanding rather than reading speed.
- **Differentiated instruction:** working in pairs or small groups, where the student could contribute ideas without being penalized for reading difficulties.
- **Psycho-pedagogical counseling:** activities aimed at strengthening self-esteem and reducing evaluation-related anxiety.

### **Outcomes**

After one academic module of consistent use, **significant improvements** were observed in reading comprehension, classroom participation, and willingness to complete reading assignments. E.A. began to show a more positive attitude toward reading and verbally expressed enjoyment in discovering stories “on his own.” Furthermore, his peers became curious and supportive, contributing to improved social inclusion.

This case illustrates how a **simple yet well-integrated technology** can transform the educational experience of a student with dyslexia, providing support not only cognitively, but also emotionally and socially (Mitchell, 2014).

## 6. Conclusions

The integration of students with special educational needs (SEN) into mainstream schools is not only a goal promoted by modern educational policies but also a social and moral necessity. When applied with discernment, flexibility, and empathy, assistive procedures become powerful tools for supporting the psychosocial development of these students and for fostering an inclusive school climate.

Optimizing such procedures requires a complex, multi-layered approach: personalized evaluations, interdisciplinary collaboration, ongoing teacher training, active family engagement, and the integration of modern technologies. Furthermore, best practices and case studies demonstrate that assistive intervention should not merely compensate for deficits but instead highlight and develop each child's unique potential.

In a constantly changing society, inclusive education emerges as a dynamic process that demands ongoing adaptation, reflection, and cooperation. Only through sustained and well-coordinated efforts can we ensure an equitable educational environment in which every child—regardless of their individual characteristics—has the opportunity to learn, to relate to others, and to shape their own path in life.

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# Self-Perceived Stress and Its Impact on Counterproductive Work Behaviors Among Employees in the Hospitality Industry

**Mihaela RUS**

Professor Ph.D. Faculty of Law and Administrative Sciences, Ovidius University of Constanța (Romania), Institute of Psychology and Philosophy of the Romanian Academy,  
Email: psiholog\_m@yahoo.com

**Cristina-Maria PESCARU**

PhD Assistant Professor, National University of Science and Technology Politehnica Bucharest, Pitesti University Center (Romania),  
Email: cristina.pescaru@upb.ro

**Abstract:** *The hotel industry is a demanding work environment characterized by intense interactions with customers, fluctuating rhythms, and high demands, which can amplify the level of self-perceived stress of employees. This stress can lead to counterproductive behaviors, impacting both individual performance and organizational efficiency. The study investigates the relationship between these variables and the impact of age and gender differences on stress and counterproductive behaviors. Objectives and Hypotheses: The research aims to assess the differences between post-adolescents and adults in counterproductive behaviors, examine differences in self-perceived stress by gender, and identify the relationship between stress levels and counterproductive behaviors. Significant differences are assumed between age and gender categories, as well as a positive correlation between self-perceived stress and counterproductive behaviors. Methodology: The study was conducted on a sample of 60 employees from the hotel industry, using the Self-Perceived Stress Questionnaire (PSS-14) and the Counterproductive Work Behaviors Inventory (CWB-C). Data analysis was carried out using the Kolmogorov-Smirnov, Mann-Whitney, and Spearman statistical tests. Results: The results indicate significant differences between post-adolescents and adults, with younger employees exhibiting counterproductive behaviors more frequently. Women also have a higher level of self-perceived stress compared to men ( $p < 0.05$ ). The Spearman correlation between stress and counterproductive behaviors ( $r = 0.331$ ,  $p < 0.01$ ) confirms that higher levels of stress are associated with increased counterproductive behaviors. Conclusions: The results underscore the significance of stress management in the hospitality industry in reducing counterproductive behaviors and enhancing the organizational climate. Organizations should implement strategies for psychological support, mentoring, and improving working conditions, thereby reducing the negative impact of stress on employees and optimizing their performance.*

**Keywords:** self-perceived stress; counterproductive work behaviors; employee well-being; hospitality industry; organizational psychology

## 1. Introduction

In the hospitality industry, self-perceived stress and counterproductive behaviors are key determinants of both employee performance and satisfaction. Characterized by a fast-paced work environment and frequent customer interactions, this industry can significantly increase the level of stress experienced by employees. Constant exposure to such conditions can lead to the development of harmful behaviors, including physical and emotional exhaustion, decreased motivation, diminished morale, and the emergence of interpersonal conflicts. In the long term, these adverse effects not only affect employee well-being but can also compromise the quality of services provided and, implicitly, the hotel's reputation.

### **1.1. Self-perceived stress of employees**

In the hospitality industry, where employees often face high demands and fluctuating schedules, stress can be considerable (Dewe, O'Driscoll, and Cooper, 2010: 24-45). Self-perceived stress reflects how employees experience and evaluate stress in their work environment. This subjective perception of stress can vary significantly from one person to another. Understanding self-perceived stress is crucial because it can influence employees' professional performance, mental and physical health, and the overall atmosphere within the organization.

Factors contributing to this stress include excessive workload, frequent customer interactions, irregular work schedules, and inadequate resources. Lazarus and Folkman (1984: 55-82) define stress as the result of the interaction between environmental demands and the individual's perceived resources to cope with these demands (Lazarus and Folkman, 1984: 55-82).

### **1.2. Counterproductive employee behaviors**

Counterproductive workplace behaviors include actions that harm the organization or coworkers, such as absenteeism, tardiness, sabotage, and interpersonal conflict. Robinson and Bennett (1995: 555-572) classify these behaviors into two categories: interpersonal deviance and organizational deviance (Robinson & Bennett, 1995: 555-572). Interpersonal deviance directly affects coworkers, while organizational deviance affects organizational resources.

Counterproductive behaviors can also be viewed as a form of reaction to perceived injustice or a lack of equity within the organization. For example, employees who feel that they are being mistreated may respond with counterproductive behaviors as a form of retaliation or to restore perceived equity (Greenberg, 2018, 561-568). Perceived stress can diminish employees' ability to manage their emotions and behaviors effectively, these behaviors can include decreased performance, absenteeism, conflicts with colleagues and superiors, as well as a negative attitude towards work tasks, the cumulative impact of these factors not only affects the individual well-being of employees, but can also damage team dynamics and the overall productivity of the organization (Bakker and Demerouti, 2017: 273-285).

The link between self-perceived stress and perceived organizational support is essential. Employees who feel that the organization does not provide them with sufficient backing may develop a sense of alienation and frustration, which can lead to counterproductive behaviors (Rhoades & Eisenberger, 2002, p. 698).

### **1.3. The impact of age on self-perceived stress and counterproductive behaviors in employees**

Employees from different age groups may perceive and manage stress differently, which in turn influences their workplace behaviors. Postadolescence and adulthood are stages of human development characterized by distinct challenges and resources that affect stress responses.

Unproductive behaviors in post-adolescents and adults include procrastination, lack of organization, technology addiction, poor stress management, and avoidance. These behaviors occur for various reasons, such as a fear of failure, lack of motivation, attention deficit disorder, external and internal pressures, or the pursuit of immediate rewards. Their adverse effects are manifested in delays in project completion, decreased



productivity, impaired physical and mental health, and deterioration of personal and professional relationships. Thus, these behaviors prevent individuals from achieving their goals and improving their quality of life.

Post-adolescent employees, aged 18-25, are often at the beginning of their careers. They may experience higher levels of stress due to their lack of experience and uncertainty about their professional futures. They may perceive the demands of the job as more stressful, having limited coping resources developed up to this point (Folkman, 2011: 3-21). Young employees are also more likely to exhibit counterproductive behaviors in response to stress due to their limited emotional maturity and lack of experience in managing conflict (Salami, 2010: 110).

The quality of the relationship between the adolescent and the mentor is primarily determined by the mentor's active and intentional involvement. Development occurs when a young person internalizes their experiences through continuous interactions with a more experienced person who possesses advanced skills. Mentors focus on activities and skill development, having a significant impact on the vocational orientation and identity formation of the adolescent. Both adolescents and those who have passed this period seek mentors among adults with whom they share common interests and from whom they hope to learn and develop (Sălceanu, 2015: 335).

According to the psychoanalytic perspective, excessive anxiety in adults can be interpreted as the result of the repression of unacceptable impulses. In this perspective, anxiety appears as a consequence of the fact that the individual was unable to adequately express his hostility in the past, being inhibited from doing so in a world perceived as hostile or threatening. This repression of impulses can contribute to the emergence of minimally unproductive behaviors in adults, such as avoiding conflicts or suppressing personal needs, to the detriment of healthy communication and relationships (Sălceanu, 2015: 195).

On the other hand, employees in the adult life category (25-45 years and older) typically have more extensive professional experience and better-developed coping strategies. However, they may experience stress from other sources, such as work-life balance, family responsibilities, and financial pressures (Gyllensten and Palmer, 2005: 271-288). Adult employees may exhibit counterproductive behaviors when their resources are overwhelmed by job demands; however, they are more likely to use constructive coping strategies and seek social support to manage stress (Lunau et al., 2015, pp. 25-40).

The main differences in the perception and management of stress between these age groups have important implications for human resource management. A relevant example in this regard is the fact that young employees can benefit from mentoring and training programs to develop professional competencies and stress management skills.

#### **1.4. Coping strategies and organizational support**

In the hospitality industry, stressors are numerous and varied, including complex customer interactions, irregular work shifts, and high physical demands. Managing self-perceived stress is crucial to reducing counterproductive behaviors in the hospitality industry. Implementing effective stress management strategies, such as training, psychological support, and improving working conditions, can help create a healthier and more productive work environment. Managers in the hospitality industry need to recognize and address stressors to prevent negative consequences on employee performance and morale.

It is also essential to foster an organizational culture that promotes social support and provides employees with adequate resources to help them cope with stress. This can

enhance both employee well-being and the overall performance of the organization. Well-supported employees are less likely to engage in counterproductive behaviors and are more engaged and motivated in their daily activities.

## **2. Objectives and hypotheses**

### **2.1. Objection**

The primary objective of this research is to investigate phenomena that are prevalent in the organizational world, specifically counterproductive behaviors and stress. Differences between these were studied according to variables such as gender and age of the subjects. Still, the relationship between counterproductive behaviors and employees' self-perceived stress was also monitored.

Therefore, we state the following objectives:

1. Assessing differences between postadolescents and adults in terms of counterproductive behaviors.
2. Examining differences in self-perceived stress according to the gender variable.
3. Identifying the correlation between the level of counterproductive behaviors and self-perceived stress.

### **2.2. Assumptions**

1. It is assumed that there are significant differences in counterproductive behaviors between the post-adolescent and adult age categories.
2. It is assumed that there are differences in self-perceived stress between males and females.
3. It is assumed that there is a positive, significant correlation between the level of counterproductive behaviors and self-perceived stress.

## **3. Sample description**

The sample for this research consisted of 60 subjects who currently hold positions as employees in the Horeca field. Of the 60 subjects, 30 are between 17 and 25 years old, and 30 are between 26 and 48 years old. Worth mentioning in this context is also the gender distribution, with participants carefully chosen to have an equal number of representatives from both the female and male sexes.

## **4. Tools used**

**The Self-Perceived Stress Questionnaire (PSS-14)** is a 14-item test that utilizes a 4-point Likert scale. This psychological questionnaire was designed to capture an individual's perception of stress, including which situations are perceived as stressful, as well as the unpredictability, lack of control, and feeling of being overwhelmed. Within the questionnaire, scores can range from 0 to 40 points, with 0-13 indicating a low level of stress, 14-26 a moderate level, and 27-40 a high level (Cohen and Williamson, 1988, pp. 31-67).

**The Counterproductive Behaviors Questionnaire (CWB-C)** comprises 10 items, each with a 5-point Likert response scale. The CWB-C questionnaire is designed to measure the frequency of counterproductive behaviors exhibited within a work climate, as well as their effects that spill over into conduct and performance (Spector et al., 2010: 781-790).

#### 4.1. Research design

The research was conducted throughout March 2024, with questionnaires distributed online. Immediately after obtaining the results, they were statistically analyzed using the SPSS program, and the findings were subsequently discussed and explained in the following sections.

#### 4.2. Ethical considerations

Participants were informed in advance about the purpose, objectives, and hypotheses of this research and were assured of the confidentiality of the data collected and processed. Additionally, they were informed that they could withdraw from the study at any time, regardless of when it was implemented.

### 5. Hypothesis testing and interpretation of results

#### 5.1. Hypothesis 1 verification

The first hypothesis assumes that there are significant differences in counterproductiveness between postadolescents and adults. Using the SPSS program to test this hypothesis, it was found that the mean of postadolescents is 18.87, while that of adults is 15.10. To verify the type of distribution, we used the Kolmogorov-Smirnov statistical test, with Sig values of 0.001 and 0.200. Therefore, after this step, we applied a non-parametric method of comparing means.

**Table 1. - Mann-Whitney U test for two independent samples (RSES)**

<b>Statistics Test</b>	
	Counterproductive behaviors
Mann-Whitney U	291,500
Wilcoxon W	756,500
Z	-2.354
Asymp. Sig. (2-tailed)	,019

a. Grouping Variable: Age

Given that the statistical significance coefficient is  $< 0.05$ , the hypothesis is confirmed. Therefore, there are significant differences in counterproductive behaviors between post-adolescents and adults, with representatives aged 17-25 years exhibiting them more frequently than those aged 26-48 years.

Recent organizational transformations have necessitated the adoption of new management styles, more focused on profit and productivity, which eliminate tolerance for unjustified, unproductive, or inefficient surplus personnel. In this context, employees are increasingly faced with short-term employment contracts or daily and hourly employment, being forced to demonstrate their competence constantly. One of the biggest problems in contemporary work is the increase in job insecurity, with the partial or total disappearance of organizational structures that, in the past, ensured the safety and security of employees' careers, managed promotions, facilitated professional development, and organized leave (Loși, Pîslari, 2021: 2).

The differences between adult and post-adolescent unproductive behaviors are evident in their nature and causes. Post-adolescents, who are at the beginning of their transition to adulthood, frequently struggle with procrastination and technology addiction due to their lack of experience in time management and academic or social pressures. In contrast, adults, while they may exhibit the same behaviors, are often influenced by more complex factors, such as workplace stress, family responsibilities, and financial difficulties.

Adults tend to have a greater awareness of the consequences of their actions. Still, they can be overwhelmed by multiple daily obligations, which can lead to poor stress management and avoidance. Essentially, while unproductive behaviors may be similar, the context and underlying reasons for them differ significantly between the two age groups.

Assessing the level of resilience is a complex challenge, as it involves multiple aspects. However, there are specific tools for this purpose. A resilient person has a clear purpose in life, which gives them the motivation to live. Perseverance refers to the determination to face stress and difficulties to achieve one's goals. Balance involves the ability to maintain a balanced perspective on life, often using humor. Personal confidence is the ability to rely on oneself to achieve goals, using strengths and previous successful experiences to make future decisions. Independence refers to the individual's ability to feel comfortable with themselves without feeling the need to conform to the majority.

In conclusion, unproductive behaviors are more prevalent in postadolescents than in adults, likely due to differences in experience, responsibilities, and emotional maturity. Postadolescents, who are at the beginning of the transition to adulthood, often experience difficulties in managing time and priorities, frequently due to a lack of experience and ineffective coping strategies. In contrast, adults, although they can also exhibit unproductive behaviors, benefit from a greater awareness of the consequences of their actions and from experience in managing stress and multiple responsibilities. The different contexts in which each age group finds itself significantly influence the nature and frequency of these behaviors, highlighting the need for personalized approaches to support development and productivity at each stage of life.

## **5.2. Hypothesis 2 verification**

The second hypothesis assumes that there are significant differences in self-perceived stress between men and women. Using the SPSS program to test this hypothesis, it was found that the average for women is 36.90, while the average for men is 34.10. To verify the type of distribution, we used the Kolmogorov-Smirnov statistical test, with a p-value of 0.200 in both cases. Therefore, after this step, we applied a parametric method for comparing means.

**Table 2. - Statistical t-test for two independent samples (BD)**

Independent Samples Test										
		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Diff.	Std. Error Diff.	95% Confidence Interval of the Difference	
									Lower	Upper
Self-perceived stress	Equal variances assumed	1,392	,243	2,169	58	,034	2,800	1,291	,216	5,384
	Equal variances were not assumed.			2,169	56,740	,034	2,800	1,291	,215	5,385

Given that the statistical significance coefficient is 0.034,  $p < 0.05$ , the hypothesis is confirmed. Therefore, there are significant differences in self-perceived stress between adults, namely, females experience stress more intensely than males.

Stress can be described as the body's reaction to a physical or emotional challenge, which requires it to adapt or endure physical or mental tension. Financial aspects can influence the level of perceived stress, affecting the feeling of personal efficacy (Mihăilescu, Năstase, Matei, Greabu and Totan, 2011: 46-48).

Self-perceived stress at work is a relatively common and well-known phenomenon that occurs when employees feel that professional demands exceed their resources and abilities to cope. Various factors, such as high workloads, tight deadlines, a lack of support from colleagues or superiors, and a lack of control over daily activities, can trigger it. The consequences of self-perceived stress can include decreased performance, increased absenteeism, and physical and mental health problems, such as anxiety and depression.

Both women and men can witness or be victims of highly stressful events, which can have long-term effects on them. Recent epidemiological studies have shown that the experience of trauma is a relatively common phenomenon, with estimated rates in the general population of 51% for women and 61% for men (Batog, 2013: 79).

The significant differences between women and men are mainly manifested in stress management strategies, such as avoidance and compensatory behaviors. It can be said that men use avoidance, denial, and compensation strategies more frequently than women, although both sexes resort to such methods less regularly. The differences between the sexes are most pronounced in a specific area of stress: the large volume of documents that need to be completed. In this context, men are more likely to recognize the presence of this factor at work (Neculau, Zaharia, and Curelau, 2007: 9-11).

Specifically in the hospitality industry, women report higher levels of self-perceived stress for several reasons. First, they are often employed in roles that involve constant interaction with customers, which can lead to considerable emotional strain. Second, high expectations for impeccable service and negative customer feedback can exacerbate stress. Many women in this field also have to juggle work and family responsibilities simultaneously, which contributes to increased stress levels. In addition, gender inequalities and limited career advancement opportunities can add layers of anxiety and frustration, intensifying the perception of stress.

### 5.3. Testing of Hypothesis 3

The third hypothesis posits a positive and significant correlation between the level of counterproductive behaviors and self-perceived stress. Using the SPSS program to test this hypothesis, it was found that the mean self-perceived stress score is 35.50, while the mean counterproductive behaviors score is 16.98. To verify the type of distribution, we used the Kolmogorov-Smirnov statistical test, with Sig presenting values of 0.75 and 0.13 in both circumstances, respectively. Therefore, after this step, we applied a non-parametric method to test the suggested correlation.

**Table 3. Spearman's Rho correlation between self-perceived stress and counterproductive behaviors**

Correlations		Self-perceived_stress	Counterproductive_behavior
Spearman's rho	Self-perceived_stress	Correlation Coefficient	1,000
			,331**
		Sig. (2-tailed)	,010
		N	60
	Counterproductive_behavior	Correlation Coefficient	,331**
		Sig. (2-tailed)	,010
		N	60

\*\* . Correlation is significant at the 0.01 level (2-tailed).

Table 3 presents the correlation resulting from the Spearman's Rho test for analysis. What we can say about this result is that it reflects a significant, positive, low correlation between the level of self-perceived stress and counterproductive behaviors. The correlation coefficient is 0.331, at a significance threshold of  $SIG = 0.00$ , indicating that the higher a person's level of stress, the more they engage in counterproductive behaviors.

In the situation where strategic behaviors are inadequate or unproductive, and the person becomes dependent on external regulation, the self-reaction process should generate a feeling of dissatisfaction and personal dissatisfaction with one's strategic performance, which should stimulate the need to improve the situation through autonomous changes (Focșa-Semionov, 2011: 93-102).

Currently, the adaptation of the workforce to profound changes in the economic and social environment involves an emphasis on individual skills, abstract thinking, and a growing importance given to knowledge-based work. Thus, new needs arise, such as the need for rapid problem-solving and the adoption of innovative methods of communication and collaboration. These requirements increase the pressure on cognitive skills and the

physical and mental demands of employees, generating new risks associated with work. Researchers and decision-makers focus their attention on identifying these risks to health and safety at work. Psychosocial risks in the organizational and social context arise from the way work is designed and managed, potentially harming the physical or psychological well-being of employees. These risks, including workplace stress, violence, bullying, harassment, and interpersonal conflicts, negatively affect the well-being and health of the individual, as well as organizational performance (Barbu, 2017: 7).

Research indicates a positive, albeit weakly significant, correlation between unproductive behaviors and stress. This can be primarily attributed to the fact that unproductive behaviors, such as procrastination or avoidance of complex tasks, can exacerbate feelings of insecurity and inefficiency in the workplace. Such behaviors can create a vicious circle in which the stress resulting from postponing tasks or not addressing problems can generate even more stress, fueling a continuous cycle of discomfort and anxiety. However, this correlation may be weak because not all individuals who exhibit unproductive behaviors necessarily experience high levels of stress, and stress can also be influenced by several other factors, such as social support and individual stress management capabilities.

The effects of stress are intensely manifested in a person's behavior and psyche. Among the most apparent behavioral manifestations are the desire to quickly complete as many tasks as possible, aggression, impulsivity, explosive and frequent verbal reactions, urging others to hurry up their speech, and a lack of patience, as waiting is perceived as a waste of time. Behaviors are often focused exclusively on the profession, with a maximally concerned approach to meeting deadlines and tasks, and the person feels constantly at odds with people, tasks, and events (Pastor, 2014, 31-39).

Although a correlation exists, it can be considered weak and significant between unproductive behaviors and the level of stress at work. This suggests that stress may indirectly influence unproductive behaviors, but it is not the only determining factor. Other variables, such as the organizational environment, relationships with colleagues, or working conditions, may contribute to the manifestation of these behaviors. It is essential to acknowledge this interdependence and take proactive steps to mitigate stress and foster a healthy and productive work environment.

## **6. Conclusion**

This research, focused on the hotel sector and involving a sample of 60 subjects, clearly highlighted the decisive roles that stress, age, and gender play in work dynamics. The study highlighted that these factors are essential and cannot be ignored when implementing interventions aimed at increasing performance and harmony in the workplace.

A possible limitation of the present study is that the data cannot be generalized to the entire population, as the sample consisted of employees from a single hotel on the Romanian coast.

A future research direction could investigate the targeted aspects among several hotel institutions, as well as a series of additional variables such as coping mechanisms, self-esteem, values, and personality of employees.

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# The Role of Social Media in Structuring Beauty Standards

Alexandra Anamaria PREDA

PhD Student, West University of Timișoara (Romania)

Email: alexandra.preda99@e-uvr.ro

**Abstract:** *We live in a superficial world where appearance is everything. Since ancient times, humankind has developed certain beauty standards, either period-specific or geographically specific. Within fields such as sociology and psychology, the idea of physical beauty is becoming more and more common, due to the complexity of the characteristics that impose physical attractiveness and it is structured especially through social media, which has influenced new beauty standards, that dictate what a person should look like in order to be considered attractive. (Rusanovschi, 2020: 157, 160). From a social perspective, beauty standards are norms, values, and expectations established by culture and society that define what it means to be considered beautiful. Broadly speaking, this research relates to the social life of individuals, the criteria of belonging to society, the promotion of consumerism and the analysis of human behavior in a social framework. Research such as this one are important both for the field of social sciences, and also for the masses, because it is useful to know the society we are part of and in which we are constantly functioning, to understand the issues that can induce deviant behavior and imbalance in society and can affect us directly or indirectly. From a traditionalist perspective, beauty is something that appears pleasing and attractive to the viewer, inducing inspiration and joy. However, in this way, beauty is subjectively perceived by each individual (Sihombing et al., 2022: 114). However, there is a lot of social pressure to look a certain type of beauty and its effects on people made it a problematic matter worth to be studied.*

**Key words:** *beauty, beauty standards, social influence, physical attractiveness, social media.*

## 1. Defining and Classifying Beauty Standards

The concept of "beauty" has been attempted to be defined since ancient times, through various fields of study, being a consuming process. The shift has gone from myths to realities derived from scientific studies that can better outline this concept. (Adamson & Doud Galli, 2003: 295) What is certain about beauty is that its importance is felt across the entire globe. Due to cultural diversity, there are multiple beauty standards considered valid depending on the culture being discussed. Cultural norms are the ones that set the ideal of beauty in a society. Beauty standards vary greatly from one culture to another, in the sense that one appearance might be considered attractive in one area and discordant in another. (Frederick et al., 2014: 1-2)

Society has created beauty standards through comparisons made between individuals, which have now become impossible to achieve. (Pramesti & Purwanto, 2022: 1)

Beauty standards target physical aspects such as body dimensions, facial proportions, weight, and height of individuals. These have been heavily influenced by evolution, social media, and other impactful societal criteria. Currently, beauty standards are defined by the socio-cultural and political systems of the population. Thus, beauty standards have acquired a normative character in society, and techniques such as the use of makeup or certain clothing items are directed towards promoting the importance of an attractive physical appearance. (Kaur et al., 2023: 2265)

Beauty standards can differ not only through the particularities that shape them but also in how individuals exposed to these standards are affected. (Gelles, 2011: 22)

By their nature, individuals desire a physically attractive appearance. Looking back in time, it can be observed that a considerable number of artistic works depict human beauty. (Yarosh, 2019: 2)

Throughout history, a multitude of diverse beauty standards have emerged and developed. For example, in the Paleolithic period, a woman considered beautiful was corpulent, with a round shape and large breasts, while during the Victorian era, beautiful women were thin and delicate. In modern times, there are different criteria that constitute beauty standards, and these are in constant change. (Karacaaslan, 2023: 11)

In Ancient Greece, there was a belief that human beauty could be understood through mathematics. Using mathematical rules, early scholars defined human beauty by measuring correct proportions or the "golden ratio." These were not only standards used to determine human beauty but also applied to architecture or painting, for example. Even though this approach is no longer in use, it is evident that the desire to understand the concept of human beauty dates back to ancient times. (Bovet, 2018: 327)

Also in Ancient Greece, it was believed that a person's beauty was automatically associated with positive character traits, such as kindness. A study found that even today, individuals considered beautiful are associated with positive traits, while those who are not considered beautiful are associated with negative traits. This study sparked a wave of research based on physical appearance, attractiveness, and external perceptions within this subject. Prior research was conducted with students to understand their opinions on the attractiveness level of unfamiliar individuals, offering them only certain general information about these people, along with a photo showing their face. Previous meta-analyses confirmed that unfamiliar individuals were rated positively based on an attractive appearance. (Langlois et al., 2000: 390)

What is certain about beauty is that its importance is felt across the globe. Due to cultural diversity, there are multiple beauty standards considered valid depending on the culture in question. Cultural norms set the beauty ideal in a society. Beauty standards vary greatly from one culture to another, as a certain appearance may be considered attractive in one area and discordant in another. (Frederick et al., 2014: 1-2)

Throughout time, beauty has been dictated by three powerful indicators: ethnicity, nationality, and race. Criteria have been established that can be generally accepted regarding physical attractiveness, but certain changes have occurred up to the present day. The 1950s had as a beauty benchmark women with round, full faces. In the 1960s-70s, tanned skin was considered a beauty standard of that period. Simultaneously, in the United States, an ideal woman with blonde hair, blue eyes, and a generous bust was established. The following years moved toward a youthful appearance, with a fit, healthy body and no visible signs of aging. (Poorani, 2012: 5)

A relationship can be made between beauty standards and the status and social class of individuals. For example, people with lighter skin are often associated to a significant extent with a prosperous financial situation or high social status. As a result, those who perceive this connection as valid may resort to depigmentation procedures to conform to this standard, even though these procedures come with a series of negative effects. Thus, beauty standards are considered "a complex social process" that influences how individuals relate to themselves and the image they construct to present to society. (Kaur et al., 2023: 2265)

## **2. Theories referring to beauty standards**

Beauty and beauty standards are complex and varied concepts, influenced by multiple social, cultural, and psychological dimensions. In contemporary studies, there are several theories and perspectives through which this topic can be approached, each offering a different understanding of how people perceive and internalize beauty standards.

Beauty is a significant aspect, but often overlooked, in the sociological analysis of intersectional inequalities and power relations. It is frequently disregarded because it is perceived as superficial, insignificant, or even trivial. (Johnston & Foster, 2025: 3)

*The intersectionality theory* was initially developed to analyze the experiences of Black women and later became a tool for understanding the influence of multiple identities on various social contexts. Intersectional studies have shown that multiple identities can lead to various consequences, differing from those that would result from simply combining the effects of individual identities. Intersectionality is not measured through a single research design, but studies in this field exhibit certain essential characteristics. According to intersectionality theory, every individual possesses multiple identities, meaning that any analysis of a phenomenon must take into account the individual's diverse identities. Having multiple identities not only affects each identity individually but also influences them collectively. (Stone, 2017: 4-5)

The theory of intersectionality focuses on specific aspects of individuals, such as gender, sexual orientation, race, religion, culture, socioeconomic status, and physical appearance. In these cases, some scenarios may result in oppression and discrimination, while others lead to power and privilege in society. Studies on body image confirm that sexualization creates negative perceptions of one's own body, but more research is needed to analyze the relationship between gender or race in this context. (Vendemia et al., 2022: 8)

*The objectification theory* studies the way individuals (especially females) are treated as objects by society and the effects of this process, primarily in psychological terms. According to the theory, individuals subjected to this phenomenon also begin to objectify themselves and adopt an observer's perspective on their own bodies. This phenomenon imposes value judgments and prioritizes physical appearance, particularly in sexualized contexts. In short, objectification theory highlights how people adopt others' opinions about their physical appearance and start focusing excessively on it, to the detriment of other potentially more important aspects of life, such as career development or interpersonal relationships. (Merino et al., 2024: 3)

*The social comparison theory* involves analyzing one's personal values and achievements by comparing them to those of other individuals. Beyond its contribution to shaping one's self-identity, comparison also plays a significant role in evaluating physical appearance, given the influence of social media on people today. Social comparison theory is essentially the act of comparing oneself to others, who may be in a better or worse position than the individual in question. This comparison can be made regarding various aspects, including physical appearance, where its impact is particularly evident. (Merino et al., 2024: 4)

There is a positive scenario in which an individual compares themselves to someone conventionally more attractive or in better shape, finding motivation to develop in the desired direction through healthy mechanisms. However, the opposite can also occur, where an individual becomes self-conscious, and their self-esteem decreases due to comparisons between themselves and what is promoted on social media as the embodiment of current beauty standards. These images may or may not be real, and the standards imposed are largely unattainable for the vast majority of online consumers. (Merino et al., 2024: 4)

As a result, the way people perceive their physical appearance becomes increasingly distorted in relation to reality, as well as to what was once considered "normal," which no longer aligns with contemporary beauty standards. Comparisons also represent a risk factor in the development of psychological disorders. (Merino et al., 2024:4).

*The theory of self-discrepancy* focuses on the relationship between what exists (how the individual is perceived), what is desired to exist (how they would like to become), and what must exist (how they are required to be). When talking about the human body, there is a significant difference between how an individual actually looks and how they imagine they should ideally look, which promotes mental disturbances. The theory also suggests that these discrepancies do not remain at a superficial level; on the contrary, they can shake an individual's mental state. People form role models based on the beauty standards they observe in society and through social media, transforming them from exceptions to the rule into rules to follow. Thus, the real physical presence comes into conflict with the physical ideal created, and these representations become increasingly different from one another. Discrepancies lead to a negative relationship with oneself, low self-esteem, and constant disappointment with one's body image, aspects that influence behavior and, in general, the individual's life. (Merino et al., 2024: 4-5)

The social constructionist perspective asserts that social norms and institutions influence what is considered attractive. Essentially, beauty standards are not necessarily dictated by biological factors. This is evident from the physical diversity of humans, such as skin color, hair type, and body structure, yet cultural beauty standards emerge. For example, lighter skin is considered more attractive in certain parts of the world. Social constructionists argue that these standards shift across historical periods and cultural contexts. Consequently, individuals often undergo physical changes to conform to societal beauty norms, from minor adjustments like hair straightening to more significant procedures like cosmetic surgery. (Frederick et al., 2014: 3)

### **3. Studies regarding beauty standards**

There are numerous studies that have focused on beauty standards. Most of these studies analyze the impact of beauty standards on women, with fewer articles addressing male beauty standards or how men are affected by them on a personal and social level.

Research on physical appearance has generally focused on females, but there has been a growing number of studies also targeting males, which is currently on the rise. (Dewing, 2007: 7) A study conducted at the beginning of this century found that 100% of the 60 female participants and 90% of the 50 male participants felt they did not meet the body ideal they desired. (Stanford & McCabe, 2002 apud Dewing, 2007: 7)

Statistics show that only 6% of what is presented on social media regarding the physical appearance of males features men with visible body fat, while the rest promote athletic, strong, and well-structured bodies. The most affected by the beauty standards promoted online are young people, who end up comparing their bodies to those of models, influencers on social media, as well as those around them, leading to dissatisfaction and negative opinions about their own appearance. In the same spectrum, fitness culture is promoted, which represents the way a body meets current beauty standards and leads to a lifestyle in which calorie deficit and physical exercise are carried out obsessively and compulsively, making individuals focus not only on the muscles they gain but also on the weight they carry throughout this process. (Fasoli & Constantinou, 2024: 2)

Originally a Western phenomenon, dissatisfaction with one's body in relation to societal beauty standards has taken on a global character. A study conducted in over 20 countries worldwide found only minor differences between nations regarding the negative opinions about body appearance. This study also confirms that there is a strong link between the perception of physical appearance and both physical and mental health. [...] Thus, it is believed that global phenomena have led to an increasingly higher level of dissatisfaction with physical appearance. (Swami et al., 2014: 176-177)

Although this topic is current, the specialized literature in Romania is quite limited in its approach. A study was conducted in our country that highlighted the attractiveness of females in negative contexts, such as the onset of bulimia or starvation in the process of physical improvement. Social media creates the illusion of the perfect body, promoted through unhealthy means such as those mentioned above. Anorexia also falls into this category. This study highlights the phenomenon of "thinspiration," which refers to the posting of extremely thin bodies on social media as the ideal of physical beauty. In the same vein, there is the phenomenon of "fitspiration," which promotes a body type similar to the one mentioned earlier, but more toned, achieved through physical exercise. However, the beauty ideals posted on social media are imaginary, constructed, or adjusted using photo and video editing programs. In addition to these body standards, scientific works confirm that a visual balance of facial features constitutes another criterion of physical beauty, as does a harmonious body shape, and their fulfillment leads to both professional and personal successes and achievements. (Dumitru & Cotel, 2018: 36-37)

Research conducted in fields such as sociology and psychology supports the possibility of the existence of beauty standards that are universally accepted. (Chang & Calhoun, 2006: 161)

Following a meta-analysis that included 919 studies and over 15,000 observers, it was concluded that both females and males from different cultures consider the same individuals attractive or unattractive in terms of physical appearance. This is a strong argument for the objective nature of beauty, as the recognition of attractiveness is an innate process that people demonstrate. It has also been shown that even babies have this ability, as evidenced by an experiment where they looked longer at individuals who were rated as beautiful and spent less time looking at individuals who were not considered beautiful by adults. (Yarosh, 2019: 2)

#### **4. Effects of beauty standards on individuals and on society**

As people age, the ideal of beauty has also changed, especially through social media, where the beauty standard has been established according to models, whose physical appearance has been altered through image editing programs. These unrealistic beauty standards have pushed individuals toward states of anxiety, depression, eating disorders caused by diets, and even suicide resulting from dissatisfaction with their own physical appearance. (Selimbegović et al., 2019: 474) Individuals who do not meet current beauty standards are socially stigmatized and pressured by those around them to believe that these unrealistic beauty standards are, in fact, achievable. (Jacob & Panwar, 2023: 2) Failure to adhere to the beauty standards imposed by the culture to which each individual belongs brings with it a wave of social shame and criticism, which can lead to anxiety or other mental health issues that may also affect the heart or other vital organs over time. (Merino et al., 2024: 3)

A person's life course is also influenced by the importance placed on physical appearance. A lifestyle refers to how an individual presents to others the things that are of great significance to them, how they would like their daily life to be, and what kind of person they would like to become. This aspect applies to individuals of both sexes. On a paradigmatic level, for the pursuit of beauty to be considered a lifestyle, it must be an action driven by one's own desire. However, there is greater pressure on females to conform to the beauty standards set by society, and a mystery arises regarding the true motivation behind the efforts to improve physical appearance: it could be an attempt to keep up with fashion or a product of patriarchy experienced over time. (Wijsbek, 2000: 454)

Physical appearance is a decisive factor in evaluating a woman, a fact derived from the film industry, advertising, and other branches and content in the online environment. The internalization of beauty standards promoted by social media brings about negative effects; individuals resort to cosmetic surgeries or bulimia to achieve the pre-established beauty ideal. Beauty plays the role of social capital, contributing to the improvement of one's socioeconomic situation and status in society. These are findings from studies, particularly European and Western, with a relatively small number of global studies based on female gender minorities. (Renault, 2019: 1)

Although it is not an explicitly stated rule, there is a normative character that individuals must conform to the beauty standards imposed by society, which propagates a series of negative effects, especially among young people who are more easily influenced. (Phan & Dinh, 2022: 1)

## 5. Conclusions

Beauty standards have always played a significant role in society. In today's world, beauty standards are deeply woven into various aspects of culture, from social media to advertising, and even in professional and personal spheres.

Beauty standards play a crucial role in shaping social norms and human behavior, profoundly influencing how individuals perceive themselves and their interpersonal relationships. These norms are constantly changing and evolving, reflecting the cultural and social shifts within society.

Although beauty standards are perceived and internalized differently depending on the cultural context, they are omnipresent and have a significant impact on an individual's identity and self-assessment. In particular, the pressure to conform to these standards can contribute to mental health issues and reinforce unequal social hierarchies.

Thus, beauty standards continue to be a defining factor in modern society, especially as their influence extends beyond the personal sphere, shaping collective social dynamics.

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# Mental Health in Romania: The Legislative Framework Between Normative Progress and Systemic Dysfunctions

Corina FUSAREA

PhD Student, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: [fusareasompsy@yahoo.fr](mailto:fusareasompsy@yahoo.fr)

**Abstract:** *This article offers an in-depth and critical examination of Romania's legal framework on mental health, centering on Law no. 487/2002 concerning mental health and the protection of persons with mental disorders. While the legislation aligns nominally with European and international standards—enshrining the principles of patient autonomy, informed consent, non-discrimination, and legal safeguards against involuntary treatment—its implementation reveals a stark divergence between normative aspiration and institutional reality. The study traces this tension by unpacking not only the structure of the law, but also the systemic dysfunctions that compromise its effectiveness: chronic underfunding of psychiatric services, acute shortages of trained professionals, outdated infrastructure, and the persistence of bureaucratic opacity. A key contribution of the article lies in framing social stigma as an institutionalized constraint, rather than merely a cultural residue. The analysis shows how legal safeguards are often undermined by structural inertia, lack of intersectoral coordination, and the failure to operationalize patient rights in clinical practice. This research is particularly relevant for international scholars, NGOs, and policymakers seeking to understand the legislative landscape of mental health governance in Eastern Europe. Romania is often cited as a case of legislative progress with limited practical transformation. Despite the law's progressive spirit—especially in its treatment of involuntary hospitalization, procedural rights, and the involvement of civil society—the psychiatric care system remains fragmented and underperforming. As such, the Romanian case serves as a cautionary example of how modern legislation, in the absence of systemic reform and political will, may become a façade masking enduring inequalities and violations of patient dignity.*

**Keywords:** mental health policy; Romanian legislation; patient rights; psychiatric reform; systemic dysfunctions.

## 1. Introduction

In recent decades, mental health has become an increasingly prominent topic on the international public agenda, recognized as a fundamental pillar of public health and social cohesion. Against this backdrop, Romania adopted Law No. 487 in 2002 on mental health and the protection of persons with psychiatric disorders—an act initially regarded as a significant step toward aligning the national mental health system with international standards concerning patient rights, individual autonomy, and preventive care.

The law enshrines modern principles of treatment, provides clear regulations for voluntary and involuntary hospitalization, introduces legal safeguards, and mandates the involvement of state institutions in guaranteeing patient-centered services. Theoretically, the Romanian legal framework reflects a clear orientation toward an integrated, biopsychosocial approach to mental health, structured around the core values of dignity, inclusion, and respect for individual autonomy.

However, the implementation of this legislation has revealed a series of structural and institutional dysfunctions that severely limit its effectiveness and social impact. Chronic underfunding of services, shortages of specialized personnel, the persistent stigmatization of patients, and the absence of coherent monitoring mechanisms represent major obstacles to the fulfillment of the law's objectives. As a result, a growing gap has emerged between the legal provisions and the actual conditions in psychiatric facilities, raising fundamental questions about the Romanian mental health system's capacity to

effectively safeguard the fundamental rights of persons with mental illness.

This paper proposes a critical analysis of the legislative framework governing mental health in Romania, with a focus on Law No. 487/2002 and the institutional mechanisms for its implementation and oversight. The objective is to highlight the tensions between the declared aims of the legal framework and the systemic realities of the field, in an attempt to outline the necessary directions for meaningful and sustainable reform.

## **2. The Mental Health Law and the Protection of Persons with Psychiatric Disorders**

Law No. 487 of July 11, 2002, republished, on mental health and the protection of persons with psychiatric disorders, constitutes a comprehensive legal framework with broad applicability to the field of mental health, bearing implications for both public policy and the rights of patients. Its provisions reflect an integrated juridical, medical, and social approach, with objectives targeting the prevention, diagnosis, treatment, and social reintegration of individuals suffering from psychiatric disorders.

The definitions provided by the law are essential for understanding the structuring of services and specific interventions. Article 5 clarifies key terminological distinctions, defining "person with psychiatric disorders" (letter a), "person with severe psychiatric disorders" (letter b), and "patient" (letter c). These classifications directly influence the applicability of protective and therapeutic measures. Moreover, the definitions of "mental capacity" (letter h) and "discernment" (letter k) are crucial in determining the extent of an individual's autonomy in making treatment-related decisions. Article 6(1) highlights the importance of education and prevention, and explicitly introduces the awareness campaign "Postpartum Depression Awareness Week" (paragraph 3).

The Ministry of Health is designated by the law as the primary authority in the field, tasked with developing and implementing the National Mental Health Program (Art. 4). The law also establishes institutional cooperation between the Ministry of Health and other entities, including the Ministry of Education, the Ministry of Labor, and non-governmental organizations, in the prevention and treatment of psychiatric disorders (Art. 7(2)).

The law recognizes two forms of hospitalization: voluntary and involuntary. Voluntary hospitalization requires the patient's informed consent (Art. 50) and guarantees the right to request discharge at any time (Art. 52). Involuntary hospitalization is applicable only when the individual poses an imminent danger to themselves or to others (Art. 54). This procedure involves a psychiatrist (Art. 58), a specialized commission (Art. 61), and a court of law, which confirms or invalidates the necessity of the measure (Art. 62). A periodic review mechanism is established to prevent unjustified prolongation of hospitalization (Art. 65).

The treatment of patients with psychiatric disorders is regulated through clear provisions on consent (Art. 29). In exceptional cases, treatment may be administered without consent only if the patient lacks the capacity to understand its necessity and has no appointed legal or conventional representative (Art. 29(2)). Article 30 stipulates that the patient or their representative may withdraw consent at any time, with the attending physician being obliged to inform them of the potential consequences.

The law emphasizes the fundamental rights of patients, explicitly prohibiting all forms of discrimination in psychiatric facilities (Art. 38). The right to confidentiality of medical information is protected under Article 33, while communication with family members and legal representatives is guaranteed by Article 42. Restrictive measures, such

as physical restraint, are strictly regulated under Article 39 and may only be applied in extreme circumstances, for limited periods, and under close medical supervision. The use of coercive measures as a form of punishment or disciplinary tool is explicitly prohibited (Art. 39(3)).

The right to challenge decisions regarding psychiatric treatment and hospitalization is explicitly guaranteed by the law, which grants patients or their legal representatives the ability to appeal to competent courts (Art. 34). In addition, the legislation allows for the involvement of non-governmental organizations in the monitoring of patients' rights (Art. 47). These organizations are entitled to carry out visits in psychiatric institutions and to submit formal complaints in cases where irregularities are observed.

Mental health services are financed through the national health insurance fund (Art. 70), as well as through specific budgetary allocations for prevention and mental health education (Art. 71). The law designates the service providers responsible for the delivery of care, including mental health centers, psychiatric hospitals, counseling clinics, and crisis intervention centers (Art. 22). Furthermore, it establishes the obligation to maintain quality standards for these services, ensuring that patients receive care that is both appropriate and aligned with international medical norms.

The legislative act under analysis provides a detailed normative framework outlining institutional responsibilities, patients' rights, and legal protection mechanisms. The procedures for hospitalization and treatment of individuals with psychiatric disorders are governed by a rigorous system designed to balance the protection of individual rights with public safety concerns. Control, funding, and inter-institutional cooperation mechanisms play a vital role in the effective implementation of mental health policy. Through the establishment of a system for monitoring and evaluating mental health services (Art. 72), the law aims to prevent abuses, improve access to treatment, and ensure the enforcement of patient rights. Additionally, mechanisms are in place to periodically review restrictive measures, ensuring that such interventions are applied only when strictly necessary and in accordance with ethical and medical principles (Art. 65(2)).

In recent years, Romania's Mental Health Law has emerged as a legislative benchmark in the protection of the rights of individuals diagnosed with psychiatric disorders, marking a significant step toward a healthcare policy grounded in inclusion and respect for human dignity. Through its modern approach, this legal framework affirms the principle of patient autonomy and guarantees access to appropriate care, thereby aligning Romania with European standards in mental health governance.

However, beyond the stated principles, the implementation of this law reveals a complex network of structural dysfunctions that considerably limit its practical impact. Key obstacles include the chronic underfunding of the mental health system, the shortage of specialized personnel, and the persistent social stigmatization of patients—factors that hinder the actual realization of the law's objectives. An analysis of this legislative framework, when contrasted with patients' lived experiences and the institutional capacity to enforce its provisions, reveals a significant discrepancy between the normative intentions of the legislator and the operational realities of the healthcare system.

A detailed examination of the legal provisions shows that the progressive principles enshrined in Romania's Mental Health Law encounter systemic barriers that impair the effectiveness of the measures it sets forth. Norms intended to enhance care through patient-centered policies are frequently undermined by structural deficiencies. Voicu and Marineanu (2017) emphasize that "implementation is affected by chronic underfunding and lack of resources," a situation that starkly contrasts with the ambitious

goals of the legislation. This financial shortfall is reflected in the insufficient number of specialists, limited training opportunities for mental health professionals, and inadequate medical infrastructure to meet the growing needs of patients.

Moreover, social stigma continues to pose a significant barrier to access, a problem compounded by legal gaps that fail to effectively address enduring cultural prejudices. Consequently, the legal protections designed to safeguard patients' interests often remain theoretical provisions, lacking effective translation into medical practice. This situation generates serious inequities in access to services and in the quality of care provided.

Therefore, although Romania's Mental Health Law represents a normative advancement, its practical efficacy is contingent upon the capacity of public authorities to implement structural reforms that address systemic deficiencies and create the necessary conditions for the effective enforcement of patients' rights.

Although Romania's Mental Health Law reflects a modern legislative model, its practical applicability is undermined by systemic dysfunctions that negatively affect the quality of patient care. Sosna and Nasirli (2020) argue that the normative architecture of the law was designed to provide an extensive framework of protection for individuals with psychiatric disorders; however, the medical system continues to be shaped by structural shortcomings rooted in nineteenth-century public health legislation (Sosna & Nasirli, 2020). The persistence of these deficiencies highlights the ongoing struggle to overcome historical constraints and to construct a mental health care system capable of meeting contemporary demands.

A critical analysis of the legislative provisions reveals an urgent need for strengthened institutional support and the implementation of concrete structural reforms. While the law provides for measures intended to ensure equitable access to medical services, its limited enforcement capacity and the chronic underallocation of resources maintain the gap between legislative intentions and implementation outcomes. This situation has led to unequal access to treatment and substantial disparities in the quality of care—particularly in rural areas, where mental health services remain severely underfunded. Moreover, cultural perceptions continue to reinforce these disparities, as patients are frequently discouraged from seeking medical assistance due to the social stigma associated with psychiatric conditions.

The analysis of the legal framework established by the Mental Health Law confirms its modernizing intent but simultaneously exposes the systemic deficiencies that require urgent and prioritized intervention. Muscalu and Rădescu (2021) point out that Law No. 487/2002 was designed to provide comprehensive protection for individuals with mental disorders in accordance with international legal principles, yet its implementation is hampered by chronic difficulties in resource allocation and the organization of healthcare infrastructure. Historically entrenched underfunding and the inefficient distribution of existing resources have resulted in a health system ill-equipped to respond to the growing demand for services, thereby exacerbating the discrepancy between normative legal standards and the actual conditions of care provision (Muscalu & Rădescu, 2021).

These challenges are further compounded by sociocultural barriers, as stigmatization remains a pervasive factor that deters individuals from seeking the treatment they need. The resulting exclusion and delayed intervention contribute to a cycle of unmet needs and reinforce existing inequalities within the healthcare system. In this context, the progressive character of the legislation is rendered largely symbolic unless accompanied by substantive reforms aimed at correcting structural imbalances and addressing the deep-rooted social factors that hinder access to care.

The rights of patients with mental illness in Romanian legislation are primarily governed by Law No. 487/2002 on mental health and the protection of persons with psychiatric disorders, republished. This legal framework ensures protection, appropriate treatment, and the safeguarding of human dignity for individuals diagnosed with mental disorders. Romanian mental health legislation seeks to harmonize patient rights with international standards, emphasizing patient autonomy, access to care, and protection against abuse.

One of the fundamental principles enshrined in the law is the respect for human dignity, regardless of the nature or severity of the psychiatric disorder. Article 35 stipulates that the care of hospitalized patients must be provided in conditions that preserve human dignity, strictly prohibiting any form of inhumane, degrading, or humiliating treatment.

Patients with psychiatric disorders have the right to equal access to mental health services, as outlined in Article 41. They must receive the best available medical care under conditions equal to those afforded to other patients within the healthcare system. Furthermore, the right to live in the community and to benefit from community-based services is explicitly guaranteed, with authorities being legally obligated to facilitate the social and professional integration of these individuals.

The right to information and informed consent is a central component in the treatment of persons with psychiatric conditions. Article 44 provides that each patient must be fully informed regarding their diagnosis, the available therapeutic options, and the potential side effects of the proposed treatment. Consent for hospitalization and treatment is mandatory, except in cases where the patient lacks the mental capacity to make informed decisions—in which case the legal or appointed representative intervenes (Art. 45). Even in such circumstances, the patient's consent must still be sought whenever possible.

The confidentiality of medical data is guaranteed by Article 33, which states that information concerning a patient's health status may only be disclosed under conditions established by law. These exceptions are narrowly defined and include situations where disclosure is required for determining criminal liability or when the patient has given explicit consent.

The right to challenge medical measures is affirmed in Article 34, which allows patients or their legal representatives to lodge complaints concerning any violations of rights guaranteed by the law. In cases of involuntary hospitalization, patients have the right to request judicial review of the decision, and the court is obligated to examine the legality of the commitment (Art. 62). Patients may also contest treatment measures administered without consent, including the use of restrictive interventions such as physical restraint, which is strictly regulated and permitted only in exceptional circumstances to prevent imminent harm (Art. 39).

Patients with mental disorders also possess the right to communicate freely, to receive visits, and to maintain contact with family and close acquaintances, as stipulated in Article 42. Limitations on this right may only be justified in exceptional cases and solely for the protection of the patient or others.

Discrimination based on mental illness is explicitly prohibited under Article 38. Hospitalized patients may not be subjected to differential treatment based on race, nationality, religion, gender, political affiliation, or any other characteristic that may constitute grounds for discrimination. Additionally, all forms of forced labor are strictly forbidden, and patients who wish to engage in work-related activities may do so only with informed consent and under conditions that uphold their dignity (Art. 42(5)).

Romanian legislation provides a relatively robust legal framework for the protection of patients with psychiatric disorders. However, the effectiveness of these rights in practice remains contingent upon adequate implementation, institutional accountability, and a cultural shift toward destigmatization and inclusivity in mental health care.

An essential component of Romanian mental health legislation is the protection of patients from abuse and unjustified treatment. Article 43 explicitly prohibits the use of psychosurgery or other experimental treatments without the patient's informed consent and the approval of an ethics committee. Furthermore, the use of physical restraints and seclusion is subject to strict oversight, being permitted only in extreme situations and for limited durations.

Romanian law places particular emphasis on the social integration and reintegration of individuals with psychiatric disorders. Article 41(3) affirms the right of every person with a mental disorder to live and work in society, and mandates that local authorities provide measures for professional and social reintegration. In this context, the mental health centers described in Article 22 play a crucial role in supporting patients through their recovery process and facilitating their access to counseling and psychosocial support services.

Nevertheless, analyses conducted by Morar, Cernușcă-Mițariu, and Dura (2013) reveal that, despite efforts to strengthen patient protection through legislation, significant gaps persist—especially concerning individuals with psychiatric conditions. Current regulations fail to ensure the effective participation of patients in therapeutic decision-making processes, a deficiency that seriously undermines both patient autonomy and dignity. Excluding patients from decisions regarding their own treatment can lead to feelings of disempowerment and isolation, reinforcing the social stigma that often accompanies mental illness. In the absence of clear legal provisions mandating respect for patients' rights, there is a substantial risk that medical interventions may fail to reflect the individual needs and preferences of those affected.

These legislative deficiencies become even more apparent when measured against international standards for the protection of patients with mental disorders. At present, Romanian mental health law addresses the safeguarding of patient dignity and autonomy with insufficient rigor—elements that are essential within a truly patient-centered healthcare system. Although Romania has formally adopted legal instruments aimed at ensuring fair treatment for individuals with psychiatric diagnoses, the actual application of these instruments remains fragmented and largely ineffective.

Mihoc and Vintilă (2012) highlight that such legislative shortcomings contribute to a medical environment in which mental health is frequently neglected—a phenomenon echoed in the broader literature concerning the psychological impact of chronic illness. The exclusion of patients from decisions regarding their own care not only diminishes the quality of treatment but also reinforces entrenched social stereotypes surrounding psychiatric disorders.

Tudorache and Armean (2013) further examine these structural deficiencies, emphasizing that the rights of patients with mental disorders are inadequately defined and poorly protected under Romanian law. The principle of patient autonomy—fundamental to contemporary medical ethics—is not fully embedded in the current legal framework. This omission not only undermines the dignity of individuals with psychiatric conditions but also perpetuates their stigmatization and marginalization within society. In the absence of robust legal safeguards, patients remain vulnerable to practices that may not fully serve their best interests or respect their individuality.

While Romanian legislation contains elements aligned with international human rights and medical ethics standards, its limited enforceability, lack of institutional clarity, and disregard for participatory care highlight the pressing need for legislative reform. A truly inclusive and ethical mental health system requires not only legal provisions but also their full, consistent, and context-sensitive implementation.

### **3. Monitoring of Psychiatric Facilities and State Control Mechanisms**

Hospitalization in a psychiatric facility is legally permissible solely on medical grounds, with the explicit aim of diagnosing and treating individuals with psychiatric disorders, as stipulated in Article 49 of Law No. 487/2002. The choice of psychiatric unit for a patient's admission must consider the proximity to their place of residence, in order to facilitate continuity of care and to enable the involvement of family members in the therapeutic process. Transfers between facilities are conducted in accordance with the regulations set forth in the law's implementing norms.

The legislation defines two types of psychiatric hospitalization: voluntary and involuntary. Voluntary admission, regulated under Articles 50–52, is akin to accessing any other medical service. The patient provides informed consent for both hospitalization and treatment and, during their stay, retains all legal rights established under the law. The patient may request discharge at any time, except in cases where the attending psychiatrist determines that there is an imminent risk of harm to the patient or to others. In such circumstances, involuntary commitment procedures may be initiated.

Involuntary hospitalization, governed by Articles 53–68, is applied only when all attempts at voluntary admission have failed and the individual suffers from a severe mental disorder that renders them dangerous to themselves or others, or when the absence of hospitalization would likely result in significant deterioration of their health status. According to Article 56, a request for involuntary admission may be submitted by the family physician, a psychiatrist, the patient's relatives, local social-medical authorities, the police, gendarmerie, fire brigade, a public prosecutor, or the court.

Patient transport to the hospital is usually carried out by ambulance. However, when the patient poses a threat to themselves or others, law enforcement may be involved, pursuant to Article 57. Upon admission, the psychiatrist evaluates the patient's condition and, within 24 hours, submits a proposal for involuntary hospitalization to the specialized commission, in accordance with Article 58. If the physician concludes that there are no substantial grounds for hospitalization, this refusal is recorded in the medical documentation and communicated to the requesting authority (Article 60).

The evaluation commission for involuntary hospitalization, established under Article 61, consists of two psychiatrists and either a physician from another specialty or a representative of civil society. The commission is required to review the patient's file within 48 hours and to issue a reasoned decision regarding the necessity of hospitalization. If the admission is confirmed, the decision must be communicated to the patient and their legal representative and subsequently forwarded to the competent court (Articles 61 and 62). The court examines the case on an expedited basis, and the patient is entitled to legal representation and may contest the hospitalization measure. Should the court uphold the hospitalization, it retains the authority to replace it with outpatient treatment at a later stage, if deemed appropriate (Article 62).

This multi-tiered procedure is designed to ensure legal oversight, prevent arbitrary detention, and uphold the rights and dignity of persons with mental illness. However, its effectiveness depends on the transparency, independence, and operational capacity of the institutional actors involved in its implementation.



In emergency situations, the attending psychiatrist has the authority to order the immediate hospitalization of a patient, with this decision being subject to review by the evaluation commission within 24 hours (Article 63). Similarly, if a voluntarily hospitalized patient withdraws consent and presents a risk to themselves or others, the treating physician may initiate the procedure for involuntary admission (Article 64).

The commission tasked with reviewing involuntary hospitalizations is required to reassess each case at least once per month and must notify the competent court if the conditions for continued hospitalization are no longer met (Article 65). If the court does not confirm the necessity of hospitalization, the patient must be discharged immediately or may choose to continue treatment under medical supervision (Article 66).

Patients admitted involuntarily are entitled to the same standards of care as all other patients, and any restriction of their rights must be strictly justified by their health status and treatment needs (Articles 67 and 68). Fundamental rights—such as communication with family, access to press, correspondence, telephone use, and religious freedom—may not be limited under any circumstance.

Monitoring of psychiatric facilities and state control mechanisms is regulated through specific legal provisions that outline the responsibilities of authorities in ensuring the protection of patients' rights. Article 72 assigns the Ministry of Health, in collaboration with other institutions, the obligation to implement measures for evaluating and improving the quality of mental health services. Psychiatric facilities are subject to regular inspections and institutional audits at both central and local levels.

The Review Commission for Involuntary Hospitalization, as provided in Article 61, plays a critical role in overseeing the legal compliance of hospitalization and treatment procedures. It evaluates each case of forced hospitalization and issues decisions to safeguard patient rights. Judicial authorities are mandated to verify and confirm the legality of liberty-restricting measures applied to psychiatric patients, with the obligation to hear both the patient and their legal representative (Article 62).

Non-governmental organizations (NGOs) and independent institutions also contribute to monitoring the enforcement of patients' rights by conducting on-site visits to psychiatric centers and submitting reports to public authorities. Article 47 provides that representatives of such organizations may request access to psychiatric institutions in order to assess care conditions and support patients in exercising their rights.

The Ministry of Health and local authorities are obligated to implement programs for monitoring and improving mental health services, ensuring that patients benefit from effective treatment in an environment that respects their dignity and autonomy. Article 70 establishes the funding sources for these activities, securing the necessary resources for periodic inspections, the development of quality standards, and the imposition of sanctions when irregularities are identified.

Despite this institutional framework, the control mechanisms governing Romanian psychiatric institutions suffer from structural dysfunctions and significant policy incoherence. As noted by Mosescu and Ștefănescu (2008), mental health policies often fail to reflect the operational realities of psychiatric institutions. Deficiencies in the monitoring process include chronic underfunding, shortages of specialized staff, and the lack of effective community support systems. Chihai (2022) emphasizes that although formal oversight mechanisms exist, they remain insufficient to address the systemic issues that afflict psychiatric care. Periodic evaluations frequently expose outdated infrastructure and insufficient financial resources needed to modernize mental health services. These are not merely administrative shortcomings—they reflect a broader political tendency to marginalize mental health within the public healthcare agenda.

Chihai et al. (2012) argue that although periodic inspections are intended to

optimize psychiatric services, financial limitations and the lack of professional training in community psychiatry remain major barriers. This gap reveals a disconnect between normative intentions and policy implementation, as current regulatory mechanisms fail to account for the specificities of psychiatric care. Funding problems and inadequate infrastructure are symptomatic of a public policy that underestimates the role of mental health in collective well-being.

Thus, while Romania's legal framework appears to offer robust oversight mechanisms, their efficacy is significantly constrained by systemic weaknesses and insufficient prioritization of mental health at the policy level. Addressing these gaps requires more than formal regulations—it demands structural investment, political will, and a genuine reorientation of public health priorities.

#### 4. Conclusion

This study has brought to light a series of essential and, at the same time, novel elements in the analysis of legislative regulations governing mental health in Romania, emphasizing the complex interaction between legal normativity, institutional realities, and the broader social context. Law No. 487/2002 emerges as a modern normative framework, integrating core principles such as patient autonomy, informed consent, protection against inhumane treatment, and equitable access to services. Nevertheless, the in-depth analysis has uncovered systemic inconsistencies that significantly limit the effective implementation of these provisions.

One of the most original insights identified is the structured discrepancy between legal definitions and everyday clinical practices. The legal distinctions between “person with psychiatric disorders,” “patient,” and “individual with impaired judgment” profoundly shape not only access to services but also the nature of the treatments applied. Yet, in the absence of coherent and standardized assessment tools, these definitions are often applied arbitrarily, potentially resulting in abuse or neglect in the protection of patient rights.

A second significant aspect lies in the observation that, although the law formally provides sophisticated mechanisms for the review of involuntary hospitalization and judicial control over treatment, these procedures are in practice often reduced to formality, poorly monitored, or inadequately communicated to patients. The involvement of non-governmental organizations in monitoring, although legally recognized, remains sporadic and highly dependent on local initiative, lacking systematic support from public authorities.

Furthermore, this article highlights an often-overlooked reality in the academic literature: chronic underfunding is not merely an economic issue, but one that produces a cascading effect across the entire legislative architecture—undermining staff training, service quality, transparency in medical decisions, and ultimately the effectiveness of legal safeguards. As such, the law risks becoming an “empty shell,” an idealistic set of norms that fail to produce tangible change in medical practice.

Another original contribution of this research is the emphasis placed on patient stigmatization as an institutional, not merely cultural, barrier. The persistence of stigma is not just a reflection of societal attitudes but is reproduced through systemic mechanisms—through internal hospital documentation, the absence of genuine reintegration programs, and the lack of an effective coercive framework to sanction discrimination within medical services. Stigma not only marginalizes but also contributes to the underutilization of services and the chronicization of otherwise treatable conditions.

In conclusion, although Law No. 487/2002 represents a legislative model aligned

with international standards, its implementation is deeply affected by a healthcare system that still operates on fragmented, reactive, and outdated foundations in relation to contemporary psychosocial realities. For the law to fulfill its protective and transformative potential, what is required is not merely piecemeal legislative reform, but a paradigmatic shift in how mental health is understood and prioritized within Romania's public policy landscape.

Thus, the real challenge is no longer just the refinement of the legal framework, but the reconstruction of the link between legal norms, resource allocation, and human dignity—a reconstruction that demands institutional responsibility, civic engagement, and a profound reconsideration of how Romanian society treats its most vulnerable members.

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# The Influence of Isomorphic Pressures From Public Funding Programs on the Emergence of Social Enterprises in Romania

**Mihaela VEȚAN**

PhD Student at Sociology, West University of Timișoara,, Department of Sociology (Romania)

Email: [mihaela.vetan@e-uvt.ro](mailto:mihaela.vetan@e-uvt.ro)

**Daniel GREBELDINGER**

PhD Student at Sociology, West University of Timișoara, Romania, Department of Sociology (Romania)

Email: [daniel.grebeldinger80@e-uvt.ro](mailto:daniel.grebeldinger80@e-uvt.ro)

**Abstract:** *This paper explores the influence of isomorphic pressures exerted by public funding programs on the emergence and evolution of social enterprises in Romania. By applying the institutional theory framework developed by DiMaggio and Powell, the study examines how normative, coercive, and mimetic isomorphism shape the social enterprise ecosystem, particularly through eligibility criteria, funding allocation mechanisms, and strategic priorities imposed by public financing. The main question of this research is: „ How does public funding influence the development and professionalization of social enterprises in Romania, considering the constraints imposed by normative and coercive isomorphism”? Thus, the main object of the study in the study is to analyze the impact of public funding programs on the development of social enterprises in Romania. Using document analysis as the primary research method, the study conducts a comparative evaluation of five public programs supporting the social economy sector between 2009 and 2023. The findings indicate that public funding programs contribute to the institutional homogenization of social enterprises, fostering legitimacy while simultaneously constraining diversity and innovation within the sector. The paper discusses both the benefits of standardization—such as increased professionalization and sectoral stability—and the challenges it poses, including reduced adaptability to local social needs and potential mission drift. By critically assessing the implications of isomorphic pressures, this study highlights the tensions between institutional compliance and the need for social enterprises to maintain flexibility in addressing complex social issues.*

**Keywords:** *isomorphism theory; legitimacy; social enterprises; Romanian public funds for social economy; social innovation.*

## 1. Introduction

In Romania, public funds have served as the primary financial source for establishing social enterprises (Lambriu & Petrescu, 2019). Since the introduction of funding programs after 2015, all social enterprises that have received public support are required to obtain either a social enterprise certificate or a work integration social enterprise (WISE) mark. The issuance of these certifications is contingent upon compliance with the criteria and principles outlined in Law No. 219/2015 on the social economy.

As a result, social enterprises in Romania fall into two distinct categories: those that hold a social enterprise certificate and those that do not. The latter category comprises only initiatives that have not accessed public funding and have found no compelling motivation to obtain certification.

The article analyses the evolution of eligibility criteria and their role in standardizing the sector. The assessment of these criteria, alongside the evaluation frameworks used in funding allocation—often prioritizing specific indicators such as the

number of jobs created or the proportion of employees from vulnerable groups—reveals a pronounced trend toward the homogenization of the sector. Consequently, social enterprises are increasingly compelled to adopt standardized organizational practices to secure funding, a shift that substantially shapes their strategic priorities and operational models.

A relevant theoretical framework for analyzing these dynamics is institutional isomorphism, as conceptualized by DiMaggio and Powell (1983), which explains how external pressures drive organizations toward conformity with institutional norms, rules, and standards. In the context of Romanian social enterprises, coercive, normative, and mimetic isomorphism collectively influence the adoption of standardized operational models, thereby reducing organizational diversity and limiting innovation potential within the sector.

Coercive isomorphism emerges from the strict requirements imposed by public funding mechanisms, compelling social enterprises to adopt rigid formal structures to meet eligibility criteria. Normative isomorphism, shaped by professionalization and standardization processes, enhances the sector's legitimacy but may simultaneously constrain organizational flexibility. Mimetic isomorphism, on the other hand, leads social enterprises to replicate successful pre-existing models, further reinforcing sectoral homogenization.

This article critically explores both the benefits of professionalization and standardization, and the challenges associated with the diminishing organizational diversity and innovation capacity within the social economy sector. By adopting a critical perspective, this study aims to illuminate the tension between the necessity for institutional compliance and the imperative for social enterprises to maintain flexibility and remain impact-driven in addressing the unique needs of the communities they serve.

## **2. Isomorphism in Social Economy: DiMaggio and Powell's theory and broader perspectives**

Isomorphism refers to the process by which organizations within a particular field come to adopt similar structures, practices, and behaviours in response to external pressures (DiMaggio & Powell, 1983). These pressures can be legal, regulatory, institutional, or professional in nature, and they often result in a homogenization of organizational forms and practices. In their seminal work on organizational theory, DiMaggio and Powell (1983) introduced the concept of isomorphism and identified three distinct types that influence organizational behaviour: mimetic, coercive, and normative isomorphism. These mechanisms are crucial for understanding the processes through which organizations align with external expectations, especially in fields such as social economy and social enterprises, where external influences such as government policies, funding structures, and societal norms play significant roles.

Beckert (1999) argues that institutionalist scholars have made significant contributions to understanding the ways in which organizations are shaped by and interconnected with their broader institutional environments.

### **2.1. *Mimetic Isomorphism***

Mimetic isomorphism occurs when organizations replicate successful models in response to uncertainty or environmental challenges. In this case, organizations are motivated to imitate those seen as successful, typically when faced with ambiguous situations or a lack of clear guidelines. For social enterprises, this could manifest in adopting business models or practices that are perceived to have been successful in other similar organizations, even if these models may not fully align with local needs (DiMaggio

& Powell, 1983). Such imitative behaviour can limit innovation within the social economy, as organizations may prioritize the replication of established practices rather than developing context-specific solutions.

## **2.2. Coercive Isomorphism**

Coercive isomorphism refers to the pressure organizations face to conform to external regulations, laws, and mandates, particularly from government authorities or powerful institutions (DiMaggio & Powell, 1983). For social enterprises, this coercive pressure is often tied to funding requirements, legal frameworks, or regulatory demands, which dictate how these organizations must operate in order to qualify for resources or remain compliant with the law. In the context of public funding for social enterprises, for example, coercive isomorphism can be observed when these organizations must adhere to rigid criteria such as minimum employment numbers, operational durations, or specific service provisions, which may limit their flexibility and capacity to innovate. The consequences of such coercive pressures are particularly notable in fields like social economy, where the need for financial sustainability must be balanced with social objectives.

## **2.3. Normative Isomorphism**

Normative isomorphism is shaped by professionalization and the influence of educational and professional networks on organizations. Social enterprises, like many organizations in the social economy, often rely on norms and standards developed by professional associations or academic fields that guide best practices and organizational behaviour (DiMaggio & Powell, 1983). This type of isomorphism can lead to the adoption of standardized models and practices across organizations, as stakeholders within the same sector push for consistency in professional behaviour and performance. Social enterprises may thus be subject to pressures from professional bodies or certification organizations that impose norms on how they should operate, further standardizing the sector (Defourny & Nyssens, 2010).

Ebrahim, Battilana, and Mair (2014) highlight that coercive isomorphism is not only influenced by government regulations but also by the expectations of funders, which may enforce practices that are more aligned with traditional business models rather than the social values of the enterprise. This external pressure may thus constrain the ability of social enterprises to truly innovate in response to the unique needs of the communities they serve.

Mair and Marti (2006) argue that coercive isomorphism in the social economy is often compounded by normative pressures, as social enterprises face expectations to conform not just to legal regulations but also to broader societal norms, which may prioritize certain practices over others. The convergence of these pressures can have significant implications for the organizational behaviour of social enterprises, shaping everything from governance structures to their social impact strategies.

Also, Vaida, R. (2015) suggests that isomorphic forces can significantly impact the social mission of social enterprises, potentially threatening their long-term commitment to social objectives. However, these forces are often difficult to resist for organizations striving to achieve both high performance and sustainability.

Trouvé, H., Rousseau, F., Eme, B., & Fraisse, L. (2010) discuss the evaluation of social economy initiatives as a factor contributing to isomorphism. They highlight that the assessment of social and solidarity economy (SSE) organizations is shaped by a tension between state-driven regulatory efforts and the capacity of SSE actors to influence the regulations that affect them. Achieving a balance between evaluation as a tool for

legitimacy and as an instrument of public regulation is essential to preventing coercive isomorphism and preserving the unique identity of SSE organizations.

### **3. Legitimacy and its intersection with coercive isomorphism**

Legitimacy is a critical concept for social enterprises, as it enables them to gain the support and trust of stakeholders, including funders, regulatory bodies, and the communities they serve. Suman (2009) defines legitimacy as the process through which organizations are recognized as valid and acceptable by their environment. In the case of social enterprises, legitimacy is not only important for securing resources but also for ensuring the long-term sustainability and credibility of the enterprise. Suman identifies two key dimensions of legitimacy: institutional and strategic.

Institutional legitimacy is derived from the alignment of an organization with societal values, norms, and expectations (Suman, 2009). This form of legitimacy is essential for social enterprises, as they often operate at the intersection of market-driven motives and social objectives. Thus, their alignment with broader societal values and norms is a vital factor in their ability to gain public trust and support. Similarly, strategic legitimacy is an operational resource, as it helps organizations meet stakeholder expectations by demonstrating that their practices and objectives are in line with the broader environment (Suman, 2009).

In the context of coercive isomorphism, both institutional and strategic legitimacy can be influenced by external regulatory and funding requirements. These external pressures, particularly in the social economy, often lead to organizations conforming to specific norms and standards that are set by funders, regulators, and other powerful stakeholders. This dynamic between coercive forces and legitimacy is significant, as organizations may adopt certain practices or structures to conform to these pressures, even if such changes are not entirely aligned with their original social mission. The resulting alignment between an organization's practices and societal expectations is a form of institutional legitimacy, shaped by coercive isomorphism, and is necessary for continued support from stakeholders (DiMaggio & Powell, 1983).

According to Suman (2009), organizations can gain legitimacy through three primary strategies:

1. **Conforming to Environments:** This strategy involves aligning the organization's practices with pre-existing institutional norms and expectations. Social enterprises can achieve this by meeting the needs of various audiences, offering decision-making access to constituents, embedding new structures within already legitimate networks, and adopting socially accepted techniques and procedures. These actions allow social enterprises to demonstrate their alignment with institutional standards, thereby gaining legitimacy. This form of conformity is similar to the concept of coercive isomorphism in DiMaggio and Powell's (1983) framework, where organizations adjust their behaviour in response to external pressures such as regulatory requirements or funding guidelines.
2. **Selecting Among Environments:** In this strategy, organizations choose environments that support their existing practices without requiring significant changes. This may involve attracting constituents who value the organization's offerings, recruiting credible stakeholders, and adjusting goals to align with alternative moral criteria. In the context of coercive isomorphism, social enterprises might seek funding environments that align with their operational models and social missions, allowing them to comply with external expectations while maintaining some degree of flexibility in their practices.

3. **Manipulating Environments:** In cases where organizations significantly deviate from prior practices, they may need to engage in cultural manipulation to gain legitimacy. This includes promoting new interpretations of social reality, mobilizing collective support for legitimacy claims, and using strategic communication to highlight constituent influence. While this strategy often involves a more proactive approach to changing societal norms, it may also be influenced by coercive forces that shape the external environment in which the enterprise operates.

These strategies involve a combination of organizational changes and persuasive communication efforts, aiming to align the organization with cultural and institutional expectations. The relationship between coercive isomorphism and legitimacy becomes apparent in this context, as both concepts emphasize the role of external pressures in shaping organizational behaviour. Coercive isomorphism leads social enterprises to conform to legal and regulatory expectations, while legitimacy strategies ensure that these adjustments are perceived as valid and acceptable by stakeholders.

The concepts of coercive isomorphism and legitimacy are interconnected in the social enterprise context, as both highlight the influence of external forces on organizational behaviour. Coercive isomorphism, through regulatory and funding pressures, compels social enterprises to adopt certain standardized practices to meet societal expectations. At the same time, these organizations employ strategies of legitimacy—particularly through conformity to institutional norms, selective environmental choices, and proactive communication—to ensure that these adaptations are recognized and accepted by stakeholders. Both frameworks illustrate the complex dynamics of adaptation and survival in the social economy, where organizations must balance social objectives with the need for legitimacy and external validation.

#### **4. Social Enterprises**

Social enterprises are organizations that pursue a dual mission, aiming to achieve both economic sustainability and positive social impact (Defourny & Nyssens, 2010). This dual mission often involves addressing societal challenges while generating income, which can sometimes create tension between the social and economic goals of the organization. As such, social enterprises are shaped by external pressures, including regulatory frameworks, funding opportunities, and societal expectations.

The concept of a dual mission is central to the definition of social enterprises. According to Dees (2001), social enterprises seek to integrate social and economic goals by applying business principles to achieve social objectives. This dual focus necessitates balancing the need for profitability with a commitment to social change. Social enterprises are often seen as innovative actors, experimenting with new models of service delivery, business practices, and ways of financing social change. Their ability to navigate this balance often depends on the available resources, including public funding, which shapes their operational strategies and governance structures (Ebrahim, Battilana, & Mair, 2014).

Innovation plays a critical role in the development of social enterprises. Innovation is a key feature of social enterprises and plays a fundamental role in achieving their social impact and economic sustainability objectives. In the context of social enterprises, innovation is not limited to products and services but also extends to business models, organizational structures, and financing methods. According to Mair and Marti (2006), social enterprises innovate in how they structure their activities, applying creative and adaptable solutions to address social, economic, and environmental challenges. These innovations are essential for meeting the needs of communities, especially as these are often underfunded and vulnerable.



As Defourny and Nyssens (2010) note, social enterprises often innovate not just in the products or services they provide but also in how they structure their activities to generate long-term sustainability.

## **5. Public Funding and Social Enterprise Development in Romania**

Public funding programs have played a pivotal role in shaping the social enterprise sector in Romania, significantly influencing both the operational models and strategic priorities of these organizations. Financial support from public funding sources often comes with explicit requirements and eligibility criteria, which direct social enterprises toward adopting standardized organizational practices. This phenomenon aligns with the theory of isomorphism outlined by DiMaggio and Powell (1983), where external pressures induce conformity within organizations. While public funding provides essential resources for social enterprises, these funding guidelines, however, present a double-edged sword. On one hand, they enable the establishment and expansion of social enterprises; on the other hand, they may limit the flexibility of these enterprises, constraining their ability to innovate or adapt to their unique social missions.

In addition to meeting the formal criteria set by funding bodies, social enterprises must also align with broader normative standards inherent in the Romanian social and economic context. These standards often emphasize the integration of marginalized or vulnerable groups, ensuring equitable access to social services, and promoting organizational transparency. The influence of **normative and coercive isomorphism** becomes particularly apparent in the context of public funding programs, as meeting these standards often becomes a critical condition for securing long-term funding and establishing legitimacy among various stakeholders (Pacheco et al., 2010). The normative pressures, in this case, are driven by both policy alignment and the professionalization of social enterprises.

### **5.1. Government-Driven Professionalization**

A key component of public funding programs is the emphasis on professionalizing social enterprise practices (Mason, 2017). Social enterprises in Romania are increasingly required to implement formalized management, accounting, and human resource practices, driven by government regulations that mandate high levels of accountability and structured reporting procedures. This governmental pressure results in the professionalization of the sector, visible in the growing importance of specialized training programs for social entrepreneurs and employees. Consequently, the operational practices of social enterprises become increasingly standardized, aligning with broader institutional expectations and norms.

### **5.2. Policy Alignment**

Moreover, Romanian social enterprises are often required to align their activities with national social policies, such as the National Strategy for Social Inclusion and Poverty Reduction (2015-2020). This alignment ensures that social enterprises are recognized as integral actors in national development, further enhancing their legitimacy within the institutional field. However, this policy alignment, while promoting coherence with national priorities, can also inhibit the innovative potential of social enterprises. By prioritizing practices that align with governmental frameworks, social enterprises may find themselves adopting models that focus more on compliance with policy mandates rather than pursuing innovative solutions tailored to their unique social missions (Pacheco et al., 2010).

## 6. Research methodology

The research method used in this study is document analysis. In this regard, a comparative analysis was conducted on five public programs dedicated to the social economy sector and work integration social enterprises, covering the period 2009–2023.

The identification of the analysed programs was carried out with the support of experts in the field of social economy, through the consultation of Financing Guidelines and evaluation grids used for each funding program. The analysis of the Financing Guidelines focused on identifying the main eligibility conditions, including:

- Project value
- De minimis aid value
- Geographic area of implementation
- Implementation period
- Beneficiaries' own contribution for de minimis aid
- Target groups
- Employment conditions for vulnerable groups
- Eligible activities
- Sustainability period
- Minimum eligibility criteria for grant administrators

The main question of this research is: „ How does public funding influence the development and professionalization of social enterprises in Romania, considering the constraints imposed by normative and coercive isomorphism?” Thus, the main object of the study in the study is to analyse the impact of public funding programs on the development of social enterprises in Romania. The study examines how public funding influences the operational models, strategic priorities, and professionalization of social enterprises, while also exploring the constraints imposed by normative and coercive isomorphism.

Regarding the evaluation grids, the analysis aimed at identifying the criteria that were awarded additional points by the funders. This approach allowed us to highlight funders' preferences for a specific profile of grant administrators, as well as for the types of supported social enterprises, funded activities, and promoted social objectives.

Therefore, the following objectives were formulated:

1. To identify the key challenges of normative isomorphism in social economy funding.
2. To analyse the evolution of the public funding programs

Starting from these objectives, the following hypotheses were formulated:

- H1: The standardization of eligibility criteria and evaluation processes in public funding programs constrains innovation and diversification among social enterprises.
- H2: The requirement for specific professional qualifications and institutional experience among grant administrators reinforces normative isomorphism, favoring well-established organizations over emerging social enterprises.
- H3: Over time, public funding programs for the social economy have increasingly prioritized financial sustainability criteria, influencing the long-term viability of supported enterprises.
- H4: The evolution of funding programs reflects a growing emphasis on impact measurement and accountability, imposing additional administrative burdens on social enterprises.

## 7. Research results

**Table 1. Analysis of Public Funding Programs (2008-2023)**

	POSDRU, DMI 6.1 – Dezvoltarea economiei sociale, 2009	POSDRU, CP 168/6.1. Dezvoltarea economiei sociale, 2014	POCU Sprijin pentru înființarea de întreprinderi sociale AP 4/PI 9.v/OS 4.16, 2018	Program: „Programul Incluziune și Demnitate Socială 2021-2027”, Sprijin pentru înființarea de întreprinderi sociale în mediul rural, 2023	Program: „Programul Educație și Ocupare” Prioritate: 4. Antreprenoriat și economie socială Sprijin pentru înființarea de întreprinderi sociale în mediul urban 2023
Value of the project	- 1.850.000 - 18.500.000 lei;	50.000 și 2.500.000 euro	Maximum 3.000.000 euro.	201.000- 3.000.000 euro	201.000- 3.000.000 euro
Value of minimis aid	It is not the case	Fixed amount, 200,000 euros/ social enterprise.	Between 55,000 euros and 100,000 euros:	Maximum 100.000 euros/ social enterprise	Maximum 100.000 euros/ social enterprise
Geographic area of implement	Requirement to implement projects at the national, sectoral, or multi-regional level, with an emphasis on promoting projects in partnership, including through transnational cooperation.	The implementation of projects in multiple regions is encouraged in order to access a larger budget.	It is exclusively intended for less developed regions (Center, South-East, South-Muntenia, North-East, North-West, West, South-West Oltenia).	Projects can be carried out in rural areas, in all regions of the country.	Exclusively dedicated to less developed regions (South-West Oltenia, South-East, South-Muntenia, North-East, North-West, West, and Center).
Implementation period	6 -36 months	6 -12 months	Maximum 36 months	Maximum 30 months	Maximum 30 months
The own contribution for the beneficiaries of de minimis aid.	It is not the case	0%	0%	10%	10%
Target groups	Roma peoples;; Persons with disabilities; Young people over 18 who are leaving the institutional child protection system; Families with more than 2 children, including single-parent families; Children at risk; Individuals who dropped out of school early Women; Persons in detention, previously detained individuals, and juvenile delinquents; Individuals dependent on drugs and alcohol, mentally ill persons; Homeless individuals; Victims of domestic violence; Individuals affected by illnesses that impact their professional and social lives (such as people infected with HIV/AIDS, cancer, etc.); Immigrants; Refugees and asylum seekers; Persons living from the minimum guaranteed income; People living in isolated communities; Victims of human trafficking;	<b>1.Individuals from vulnerable groups:</b> (a) Roma ethnicity individuals; (b) Persons with disabilities; (c) Young people over 18 leaving the institutional child protection system; (d) Families with more than 2 children and/or single-parent families; (e) Children at risk; (f) Individuals who dropped out of school early; (g) Victims of domestic violence; (h) Women (in vulnerable situations); (i) Individuals living on the minimum guaranteed income; (j) People living in isolated communities; (k) Victims of human trafficking; (l) Individuals affected by occupational diseases. 2. Social workers, personal assistants, community assistants, family mediators, health mediators, foster parents, caregivers, and staff from residential institutions; 3. Managers of social economy structures; 4. Specialists and trainers involved in the social economy.	Individuals who wish to establish social enterprises. In the context of this call, young people who are NEETs (Not in Education, Employment, or Training) are not eligible to be part of the target group.	Individuals who wish to establish social enterprises in rural areas;  Vulnerable individuals from rural areas.	Individuals seeking employment, young people over the age of 30, unemployed individuals, long-term unemployed, individuals from disadvantaged groups in the labor market, inactive individuals.

	Other vulnerable groups; Social workers, personal assistants, community assistants; Family mediators, health mediators; Foster parents, caregivers, residential institution staff; Social enterprise managers; Specialists and trainers involved in the social economy.				
Conditions regarding the employment of vulnerable groups.	There is no reference to this aspect.	At least 50% of the total jobs created must be for vulnerable individuals. The cumulative working hours of vulnerable employees must represent at least 30% of the total working hours of all employees.	There is no reference to this aspect, and no additional points are awarded through the evaluation grid.	- At least 20% must be from disadvantaged groups on the labour market, unemployed individuals, and inactive persons. - At least 9% of the total target group must be Roma individuals from rural areas.	
Eligible activities	Research, studies and analyses, seminars, conferences, working groups, publications in Research and Promotion Activities; Workplace integration services, temporary employment or on-the-job training, creation of permanent jobs for disadvantaged people on the labor market and sheltered workshops; Vocational training programs, including the development of ICT skills for disadvantaged groups; Provision of employment services; Development and delivery of training programs for social enterprise managers and specialists involved in the social economy; Development and implementation of training programs for trainers in the social economy; Establishment and development of networks, umbrella organizations, and resource centers for social economy structures; Campaigns to promote a healthy lifestyle, prevent health risks, and raise awareness of the need for regular medical check-ups; Marketing activities, such as organizing fairs and exhibitions, conducting market research; National, regional, and local information events on social economy	General activities: similar to those from 2009, with the addition of activities under the scope of de minimis aid: Establishment and development of social economy structures; Development and promotion of integrated activities, which include information, counseling, training, business planning, and support for business initiation, aimed at initiating and developing social economy structures that receive de minimis aid; Development and delivery of training programs for managers of social economy structures and specialists involved in social economy structures that receive de minimis aid, to develop the necessary knowledge and skills, such as business planning, entrepreneurship development, marketing and sales, financial management, etc.; Workplace integration services, temporary employment or on-the-job training, creation of permanent jobs for disadvantaged people on the labor market, and sheltered workshops; Development of services, such as information services, vocational training, counseling, etc., to support managers and structures of the social economy; Marketing activities, such as organizing fairs and exhibitions, conducting market research.	I.1. Informing the public about the actions carried out within the project I.2. Selecting the target group that will participate in the support activities organized – at least 60 people must be selected; I.3. Running a specific entrepreneurial training program - Entrepreneur in social economy (COR code 112032) or - Social enterprise manager (COR code 112036) <b>I.4. Providing personalized counseling services by the scheme administrator for social entities after the completion of the business plan selection process</b> (at least one activity): - Counseling activities in the field of social entrepreneurship; - Counseling activities in entrepreneurship, including identifying market opportunities. Additionally, other necessary courses may be organized (advanced or specialized training in relevant areas for social entrepreneurship), justified by	The funding scheme remains in two stages, as in the 2018 Call, with the exception of activities in the <b>additional activities</b> category.	The funding scheme remains in two stages, as in the 2018 Call, with the exception of activities in the <b>additional activities</b> category.  <i>A specific condition is introduced, stating that after the signing of the subsidy contract, no support services for business operation and development (such as entrepreneurial counseling, legal advice, mentoring, etc.) can be offered within the project.</i>

	<p>issues; Establishment and development of social economy enterprises and cooperatives; Exchange of good practices in social inclusion and the social economy, between regional/local, national, and transnational actors in the field of social economy; Innovative, interregional, and transnational activities for the development of the social economy. etc.</p>		<p>graduation certificates.</p> <p>Other types of activities that can be implemented by grant operators (additional activities)</p> <p><b>Creating and strengthening partnerships</b> with relevant actors from the labor market, educational system, healthcare system, social assistance services, employment services, or local/central government, in order to increase involvement in providing services for vulnerable groups;</p> <p><b>Creating support networks and establishing partnerships</b> to disseminate best practices and information, as well as capacity-building activities and know-how transfer with other communities, at the national level or from other Member States;</p> <p><b>Developing tools for better knowledge of the sector</b> and improving the visibility of the social economy – including initiatives to promote the social brand and raise awareness of the specific forms of action in the social economy.</p>		
The minimum sustainability period for jobs		6 months	6 months	6 months	6 months
Minimum eligibility criteria for grant administrators			<ul style="list-style-type: none"> <li>- At least 60 people selected for training courses;</li> <li>- At least 90% graduates of the training courses;</li> <li>- At least 10 business plans selected (10 social enterprises established);</li> <li>- Each beneficiary of the de minimis aid must hire, no later than 3 months after the signing of the subsidy contract, at least 2 people;</li> <li>- No later than the fourth month, the social enterprise certificate must be obtained.</li> </ul>	<p>At least 100 people selected from rural areas trained; 80% of trainees graduate the course.</p> <p>At least 21 social economy entities established.</p> <p>Newly created jobs (minimum 4 per social enterprise) must have a working schedule of at least 4 hours/day and be for an indefinite period.</p>	<p>At least 100 people selected from rural areas trained; 80% of trainees graduate the course.</p> <p>At least 21 social economy entities established.</p> <p>Newly created jobs (minimum 4 per social enterprise) must have a working schedule of at least 4 hours/day and be for an indefinite period.</p>

The analysis of five public funding programs for social economy in Romania between 2008 and 2023 reveals several key trends and impacts:

### **7.1. Support for the development of the social economy ecosystem**

Initially, public funding programs provided broad support aimed at strengthening the social economy ecosystem. This included funding for research, resource center development, and the dissemination of best practices. However, over time, this support has been progressively reduced, suggesting a strategic shift towards a more focused approach that prioritizes the establishment of social enterprises over the development of the broader ecosystem. The decline in funding for research and capacity-building activities poses long-term risks for the sector, as the sustainability and innovation of social enterprises often rely on knowledge-sharing, research, and institutional support. The absence of funding for ecosystem-building activities could hamper the development of a more diverse and resilient social economy.

### **7.2. The shift towards large-scale projects and operational efficiency**

The funding guidelines have evolved from a broad support system for the social economy to a more rigid framework emphasizing scalability and operational efficiency. While this may foster a results-oriented and structured approach, it also risks excluding smaller actors, who may have strong expertise but lack the operational capacity to meet the increasingly stringent funding requirements. For example, the doubling of the minimum number of required social enterprises financed by a single project (from 10 in 2018 to 21 in 2023) reflects a clear preference for larger-scale projects, potentially limiting access to funding for smaller organizations with limited resources but valuable grassroots knowledge. This trend raises concerns about the inclusivity of funding programs and whether they adequately support a diverse range of actors within the social economy sector.

### **7.3. The role of grant operators and normative isomorphism**

Grant operators play a central role in shaping the outcomes of public funding programs. These intermediaries, by virtue of their authority, exercise significant influence over the selection and management of social enterprises receiving funding. According to the theory of **normative isomorphism**, grant operators, through their oversight and administrative functions, impose standardized practices on social enterprises. This is reflected in their involvement in defining target groups, designing evaluation criteria for business plans, and organizing training programs. By enforcing these standard practices, grant operators help ensure that funded social enterprises comply with institutional expectations, which in turn shapes the overall direction of social enterprise development. This institutional influence limits the capacity for innovation, as social enterprises are expected to conform to predefined models rather than develop unique approaches to addressing local social needs.

### **7.4. The standardization of social enterprises in Romania**

The imposition of mandatory conditions through funding guidelines—such as minimum numbers of trained individuals, graduates from training courses, social enterprises established, and specific operational requirements—illustrates the funder's preference for standardizing the sector and high level of control. While such standardization contributes to consistency and accountability, it has significant implications for social enterprises' ability to adapt to the specific needs of the

communities they serve. The rigid requirements regarding staffing levels, employment contract start dates, and other operational specifications may not align with the dynamic needs of different communities, potentially limiting the flexibility of social enterprises in responding to local challenges.

This normative pressure toward standardization can constrain the ability of social enterprises to innovate. Social enterprises, which are often defined by their adaptability and responsiveness to local social needs, may face difficulties in tailoring their services or operations to meet the unique requirements of their target communities if they are excessively constrained by external standards. The tension between the desire for standardization and the need for local adaptation is a central issue in the application of normative isomorphism to the social economy sector.

### 7.5. Professionalization and capacity building

The professionalization of social enterprise management, driven by funding requirements, has led to institutionalized practices in financial reporting, governance, and accountability. This process has also contributed to the expansion of support networks and professional associations for social enterprises, as well as the development of specialized expertise among stakeholders involved in the management of public funding. While these developments have enhanced governance and accountability, they have also inadvertently restricted the diversity of management models within the sector. The focus on bureaucratic compliance may limit the capacity for innovative or alternative approaches to managing social enterprises.

## 8. Discussion

While normative isomorphism ensures professionalization and enhances sector legitimacy, it also poses challenges such as reduced diversity and innovation. Organizations may prioritize compliance over mission-driven activities, leading to potential inefficiencies in addressing complex social problems.

As social enterprises in Romania increasingly rely on public funding, the pressure to conform to normative expectations intensifies. The benefits of normative isomorphism include professionalization, increased legitimacy, and enhanced access to funding opportunities. However, these benefits come at a cost.

- **Benefits of Professionalization:** The standardization driven by public funding programs helps social enterprises develop clear operational procedures, which can improve efficiency and ensure long-term sustainability. By adhering to professional norms, social enterprises become more competitive for public contracts, building trust with stakeholders and governmental bodies. This professionalization also contributes to the credibility of social enterprises as legitimate actors in the social economy sector (Mason, 2017).
- **Risks of Over-Standardization:** While professionalization can be beneficial, it also poses risks for social enterprises, particularly in terms of innovation. By aligning too closely with public sector models, social enterprises may lose sight of their original social mission. The emphasis on measurable outcomes and financial sustainability may overshadow the core social objectives, leading to a situation where the pursuit of profit and performance metrics becomes prioritized over community engagement or social transformation (Mason, 2017).
- **Homogenization vs. Diversity:** As social enterprises in Romania adopt similar governance structures, management practices, and target beneficiary groups to meet funding criteria, the diversity that is often characteristic of the social economy sector diminishes. This homogenization, driven by normative

isomorphic pressures, may create a 'one-size-fits-all' model of social enterprise that fails to account for the diverse needs and contexts of different regions or marginalized groups within Romania. As Pacheco et al. (2010) suggest, while standardization can simplify compliance and operational consistency, it can also reduce the adaptive capacity of organizations to respond to local conditions and emerging social issues.

Mason (2017) shows that as social enterprises become more dependent on public sector contracts for funding and sustainability, the government may become the most influential stakeholder group. This means that the government could replace social beneficiaries -the communities or groups that social enterprises serve- as the main influence on the decisions and direction of the organization. In this context, social enterprises may be forced to prioritize the government's requirements and expectations over the needs of social beneficiaries.

The tendency toward standardizing the sector of social economy, which negatively impacts social innovation, is not supported by a report conducted by Ashoka (2018) and referenced by Iancu, Popescu, and Popescu (2020). They argue that the context in Romania does not necessarily encourage social entrepreneurs; instead, it motivates them to be creative, energetic, and resourceful in seeking innovative solutions and overcoming the barriers that hinder their initiatives.

This perspective may be particularly relevant given that Ashoka uses a broader concept of the *social innovator*, and the study does not explicitly distinguish between initiatives that have received public funding and those that have not.

## 9. Conclusion

Public funding programs for social enterprises in Romania exhibit strong characteristics of normative isomorphism. The institutionalization of standardized objectives, eligibility criteria, financial constraints, and professionalization requirements has led to increased homogeneity among funded enterprises. While these measures ensure accountability and structured growth, they also constrain flexibility and limit the emergence of alternative business models in the social economy sector. Future funding strategies should consider more adaptive and context-specific approaches to support innovative social enterprises beyond rigid normative frameworks.

While public funding and professional norms enhance the operational capacity of social enterprises, they may also restrict their potential to address social issues in novel and context-specific ways.

Future research should explore how these pressures impact social enterprises' ability to innovate, particularly considering new societal challenges. There is also a need to assess how the long-term reliance on public funding may shape the sector's ability to diversify and pursue socially innovative models beyond the constraints of normative isomorphism.



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# **Crisis Resolution Mechanisms Among the Omvang (Eastern Cameroon): Traditional Diplomacy in the Service of Peace Promotion**

**Carin ZE AYE**

Senoir Lecturer, University of Bertoua (Cameroon)

Email : carin.zeaye@gmail.com

**Abstract:** *This research aims to be a demonstrative approach to the anteriority of diplomatic practices in traditional African societies in general and in Eastern Cameroon in particular. It protests against the modern Eurocentric conception which implies that the resolution of international conflicts today is only an emanation of the action of the great powers or the repetition of traditional conflict resolution mechanisms. But it disappeared with the arrival of colonization. The hierarchical society set up by Chief Nkal Mentsouga where each member of the family had a considerable place and a well-defined role in promoting the peaceful management of disputes, succession crises and local politics for the benefit of social harmony, peace and concord. This text raises the problem of managing violence within primordial socio-cultural groups and seeks to show how these issues are expressed in realities more or less in terms of land problems and crises in a complex society of Eastern Cameroon. It emerges that the Omvang society before Nkal Mentsouga is of the lineage or segmentary type. Their institutions are identical to those of the forest peoples, notably the Beti-Bulu-Fang. These peoples have imagined and applied mechanisms and power stratagems to ensure the most harmonious management possible of populations and property.*

**Keywords:** *dispute resolution; traditional diplomacy; decentralization; omvang; east Cameroon.*

## **1. Introduction**

Conflicts have always marked inter-human relations. The fight for access to natural resources, competition for survival or the diversity of goals to be achieved are the main causes of disputes. The history of the Omvang country is riddled with disputes. This territory, which later came the Nguelemendouka District by Law No. 59/631 of July 6, 1959, is full of riches that can be observed both in the landscape and in the human groups that populate the area. The hierarchical society built by Chief Nkal Mentsouga, where each member of the family had a special status and well-defined roles, promotes peaceful governance and management of disputes, inheritance crises, etc. in peace and harmony. This observation raises the problem of traditional mechanisms for managing violence within primordial socio-cultural groups. So, what are the traditional mechanisms for resolving disputes among the Omvang? What are their dynamics in connection with the decentralization that is fully materializing in Cameroon? The approach adopted here is the description and analysis of the facts marked by the narration of the informants and the exploitation of written documents that deal with this question. Thus, we had adopted the method of private investigations with informants aged at least 55 years old occupying positions of responsibility within families or villages. This analysis is articulated in two stages, the first of which establishes a typology of crises among the Omvang. The second describes the approaches to resolving this crisis that this people has developed.

## **2. Typology of crises among the Omvang**

The main disputes among the Omvang (Sikonda and Ngomeya) were mostly related to problems of wars or rivalries, land, inheritance, but also to agro-pastoral disputes and those caused by social defects. Land or territorial disputes, succession and inheritance crises were in fact the most frequent and the most violent.

### **2.1. Land and inheritance disputes**

In Omvang country, living space refers to land to cultivate, pasture and residential areas, most disputes were inherent to these issues. Inheritance, for a natural or legal person, consists of benefiting from the property of a person. The act of inheritance often occurs upon the death of the owner. One can be a successor without being an heir to the property. In Omvang tradition, property is supposed to revert to all the children of the deceased. Consequently, inheritance is necessarily divisible and this is where land and inheritance disputes can give rise to open conflicts because land has often been an object of covetousness and rivalry (Mbeng Dang, 2004 :40). Often, after the death of the parents, certain members of the family seized the greater part of the inheritance left (material or land). The rest, who find the distribution of land left by ancestors unequal and arbitrary, very often leads to sometimes bloody disputes. This problem arose especially in families with a large number of children. The land used for agriculture, the main source of income (thanks to the marketing of cultivated products), production of consumer goods and the scope for the construction of huts for dwellings, becomes narrow and insufficient. The illegal sale of land concerned land belonging to common property, which was sometimes sold by a member of the family without the knowledge of the others. Family disputes then arose because in the majority of cases, the funds acquired were only received and used by the seller.

### **2.2. Succession crises**

Succession consists of taking the place of another in his prerogatives and obligations (rights and duties). In this case, the son replaces the deceased father. Succession conflicts do not seem to have reached the scale of violent wars as demonstrated by the case in certain chiefdoms, in West Cameroon for example. Nevertheless, among the Omvang, succession at the head of families and chiefdoms brings recurring disputes. Succession was once a linear homeland. The father or chief designated his successor during his lifetime. It turned out that in polygamous families, some wives distorted the will of the deceased for the benefit of their own interests and those of their offspring. Only the effectiveness of mediating patriarchs was the means of appeasement and restitution to the legitimate successor. Another scenario was when the deceased chief left no children but only widows. In this case, it was one of his brothers who had to ensure the succession rivalry (Mbeng Dang, 2004 :47). The thirst for power therefore led to deadly crises because the candidates had to first fight mystically in order to determine the winner who should take temporal power. In the latter case, it could happen that the intruders intervened in the fight and snatched the chieftaincy for another new ruling family. This is how Chief Messougla Raymond Pascal, chief of the Omvang group, succeeded in removing the throne of Mvanda for Ngouong and it was only after nearly 73 years that this throne returned to his fiefdom after an open dispute.

### 2.3. Disputes and wars due to “the women question”

Old administrative reports give indications of the same nature: frequency of palaver and tribal wars due to “the question of women”. Let us note, at the outset, that competition is not exercised in terms of sexual services that are requested from women. Unmarried young people have complete sexual freedom among themselves a husband can put one of his wives at the disposal of a friend, a cousin or strangers; exchanges of women are possible, like reciprocal loans. Among the Omvang, women are property; they are assimilated to “merchandise”, “they are part of the “mébi” property of the group to which they belong through marriage”; adultery by married women “is punished severely because it is considered theft”; women have no personal property outside of their hut and their goods of use; they do not have access to inheritances; they are inherited rivalry (Mbeng Dang, 2004 :60). But it is a good of a special nature; it is the good par excellence a creative “capital”. A source of products (through its agricultural function, all the more important now that women participate in them) and of services (through its various domestic functions). A source of power: through the “procreation of children contributing to the defense of the group for the benefit of alliances (Geschiere 1991)”; through the system of alliances that it allows. A source of kinship, it expands the number of relatives, people with whom one maintains relations of exchange of services and gifts, people who can provide help and assistance. In a society where livestock breeding practically does not exist, where land ownership was non-existent for a long time, where the mobility of the group requires the mobility of goods..., the possession of many women becomes the sign of wealth and the condition of any access to abundance.

The movement of women from one family group to another among the Omvang was extremely important in the social organization of the Sikonda and Ngomeya. It establishes links, alliances between isolated family groups; it allows the boundaries of family and clan groups to be broken down. This is particularly essential in a society where tribal or clan unity does not exist locally, where groups are dispersed, where no hierarchy functions at the tribal or clan level. As among the Maka, the first documents relating to the Omvang identified by the first ethnologists, insist on this use of marriage alliances to acquire preeminence or ensure security. The law of exogamy and the process of using the dowry contribute to the multiplication of these links. Marriage is prohibited not only in one's own clan (which is the father's clan in this patrilineal society), but also in the mother's clan. The dowry recovered by marrying the daughter into a clan is used to provide the son with a wife from a foreign clan. Thus, a family group composed of the father, the mother and two children, a girl and a boy, married, is included in a system where the links play between four clan fragments. This linking function is at the very basis of social organization. Thanks to it, family groups are attached to each other, particularly within a complex network of relationships rivalry (Mbeng Dang, 2004 :61). They are no longer biological, economic, political units withdrawn into themselves. This explains, at the same time, the absence of freedom in terms of choice of spouse. The family group (in the person of the head of the family) chooses the alliance that is most advantageous to it; the violence of the reactions when a woman leaves the group she married (by abandonment or abduction) is not only a material harm that is caused but, above all, a rupture of alliance (and the group victim of this rupture reacts as a whole).

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#### **2.4. Agro-pastoral disputes and those caused by social defects and witchcraft**

Very often, goats, chickens and other domestic animals in each village have a mark that each owner gives them. This makes it easy to distinguish them. Disputes arise in the event of theft or death of animals, because they are often caught in traps set at the edges of villagers' fields as protection. These livestock enter the forest and devastate crops, thus causing great harm to the owners who sometimes, exhausted from complaining without success, kill them and this situation degenerates into litigation. An Omvang patriarch declared in this regard "me ti me le a mod muo mele a elem". Translation: "the blood that flows in the veins of the animal is the same as that which flows in the veins of man. This means that he who kills your animal seeks to kill you yourself. Thefts in the plantations were, however, quite regular. These were generally people, beset by famine and misery, who entered their brothers' fields to steal products to feed themselves or sell. This happened in the case where the land on which one had cultivated oneself was unproductive or when the culprits were driven by laziness. Numerous cases of rural theft were reported in traditional chiefdoms. From Ekpwassong I and II, Mvanda to Nguong Mebi and Ezambé, women were accused of having totems that went into the plantations to ravage the food of others.

Rationality would dictate that we question the existence or not of witchcraft. This question is really of no importance in the eyes of a society already won over to the belief in witchcraft. As a social fact, it is better to ask what is its harmful place in the universe of conflict. In other words, how is witchcraft or the belief in witchcraft harmful to the peace and security of people and property. Those who know something about it say little or nothing at all. Accusations of witchcraft are certainly more numerous than witchcraft itself, but even false, these accusations certainly have the same destructive power as proven witchcraft. They create a psychosis that is detrimental to peace, particularly to peace in the home. Due to its psychological impact, the mere mention of witchcraft can permanently destabilize individuals, families or an entire community if adequate and timely measures are not taken. This is what justifies the importance of the subject regardless of what is but what is believed in a given society. In the Omvang country, witchcraft has always been considered only as the power to "harm others through a mystically spiritual action".

However, there were disputes over witchcraft practices among the Omvang. By historically listing a few cases chronologically. In 1919, in the village called Efoulan, Mekok Rigobert was accused of practicing witchcraft, lynched and chased from the village. It took the intervention of Chief Dang Nguélé to put an end to this dispute. In the seventies, Mr. Malouma's dominant position at the regional level seemed to guarantee the stabilization of political relations under the control of the regime. The fact of combining the functions of section president and member of the national political bureau gave him a preponderant influence in the granting of many positions in the political-administrative hierarchies of the region. In practice, however, his authority was not sufficient to prevent serious conflicts from breaking out within the regional elite. The particularities of Cameroonian political life and the extremely hierarchical nature of the party and the tendency to interpret any sign of disagreement as a serious subsidy of the ideal of unity imposed by the President himself; meant that such conflicts remained latent; they could therefore become all the more virulent (Geshiere 1982:74). In Haut-Nyong, the town of Nguelemendouka had the reputation, in the 1970s until today, of a place where relations between politicians were particularly tense. With regard to land disputes, the old banana tree and the lemongrass were often planted in lines along plots of land to materialize the land boundaries of each party after the resolution of the dispute. If this boundary was crossed or violated, it brought bad luck to the seeds or boundaries that could sometimes lead to the destruction of the entire plantation. This means that the mediators did not choose these immortal plants at random. They had both spiritual and temporal value.

### **3. Traditional approaches to dispute and crisis prevention**

Among the Omvang as among the Beti, peace established harmony between different groups and eased tensions. In general, it established balance between border peoples and all therefore had to work towards maintaining peace.

#### **3.1. Role of exchanges and identity groupings in preventing disputes**

This articulation aims to show to what extent identity groupings and traditional alliance systems were factors in promoting social dialogue, a guarantee of dispute resolution and lasting peace; gatherings of individuals based on a certain number of affinities that can be religious, linguistic, historical or ethno-regional and therefore the audience varies from one place to another. As for the pre-colonial Omvang, it was mainly an ethno-regional gathering because every last Sunday of the month it brought together all nine Omvang Ngomeya villages and nineteen Omvang Sikonda in a specific public place. These places were generally sacred places (crossroads, the shade of a tree, on the edge of a watercourse). It is a periodic market that takes place at the boundary of the lands of the two clans or two families for the purpose of trading. There, food products (banana, macabo, yam, potato, goat, sheep, chicken, peanut, cucumber, legume, smoked and fresh meat) and other products such as animal skins and forged objects are bartered. It is therefore not a market geared towards enrichment or the accumulation of goods, but rather with a view to satisfying the needs of the community and especially strengthening lasting bonds of friendship. Among the Ngomeya, this gathering was called "Ewonga" and among the Sikonda "Bouama". In addition to this, traditional chiefs came together with the aim of promoting the political, social and economic development of the Omvang villages. This sort of monthly congress allowed the different populations to get to know each other better and to have a strong sense of mutual solidarity to the point where when a land dispute arose between neighboring villages. These regular contacts meant that the first recourse was social dialogue. It is in this logic that the land dispute between the Yekombo of the Mebi village and Akpwa'a of the Ngouong village was peacefully resolved.

Neighboring villages with common ancestors who wanted to separate over a plot of forest called “afan Bewo’o” (chimpanzee forest); It was the same under Messougla Ndane Raymond who had succeeded on several occasions in putting an end to the various land disputes of his group. From memory, we can note the disputes between the villages Mvanda II and Efoulan; Ngouong and Ezambé II, Mialoné and Imbet. In the same logic, the Omvang Sikonda chief Mimbang Nguélé François had succeeded in settling the land conflicts between Akilbenza and Ngomenang, Nkolbana and Koumbou Miambo and Koumbou.

### **3. 2. The influence of inter-village marriage alliances**

Peace alliances were of several kinds and women played a major role in them. First, there were matrimonial alliances or inter-village exchanges of women; for the needs of strengthening the Omvang tribe. Thus, being married in a neighboring village, women wove “mother-daughter” meetings like “Nso’o Ngoan” which allowed the strengthening of solidarity, mutual respect in order to avoid bloody disputes. All disputes had to be resolved within these groups and when the men did not find a consensual solution to the dispute between them, the solidarity of their wives appeased them. A chief who feared the strength of another immediately sent him a daughter in marriage or vice versa. This was especially the case in the Omvang chiefdoms; the woman thus presented herself as a gift behind which was the ideal of peace. The exchange of women thus completely prevented or slowed down the outbreak of conflicts, leaving room for interpersonal relationships between chiefs through the exchange of gifts and wives, proof of the demarcation of hostility and aggressiveness in favor of negotiation procedures. The exchange of women has often served to promote peace between social groups. As the second degree chief Messougla Raymond said: We cannot allow war to settle between us because we are forever linked by blood ties, the blood that our daughters have shed on both sides of our villages by giving birth. For the good of this offspring, we must put our egos aside for the benefit of peace. This word of wisdom from a group leader had become the slogan for the promotion of peace between Omvang communities to this day, thus validating the place of matrimonial alliances as a factor in resolving disputes (Nguele, 1990 : 11).

### **3. 3. The influence of the lineage system in the promotion of peace among the Omvang**

The lineage system provides the best example of a pre-colonial decentralized society. The constituent elements of the lineage are descendants of the same ancestor. Its males marry and leave the family unit to form their own family. They give birth to agnates united among themselves by legitimate parents. These males are founders of structured lineages. In this context, we note that each unit is composed of several men with their wives and children. It becomes obvious that recourse to the family is enough to bury the hatchet and settle a dispute between the members of the unit concerned. The peaceful and family solution is enough and prevails over all other solutions. The law is not the prerogative of an institutionalized authority but the fact of a series of councils of elders (Nguele, 1990 : 20).. For example, if a conflict arises between lineages 3 and 4, the elders of each unit come together to find a peaceful solution because the said conflict is a matter of brothers or family. In short, societies with a decentralized form can be presented as dual-focus organizations, where two equivalent centers are set in motion at any time. Their decisions, if any, must be agreed by both parties and do not include any mention by a higher authority. We can therefore conclude that before the colonial period, the region that today corresponds to Eastern Cameroon had known several lineage societies including the Omvang.



### **3.4. The art of mediation and reconciliation**

Among the Omvang, the role of mediation is attested in the past by many oral traditions involving elders, a symbol of wisdom that often helped to end various intercommunity disputes. Dialogue is the normal mode of regulating social relations. Its absence or deficit is rather indicative of a state of crisis in a given society. Dialogue is the normal mode of regulating social relations. Its absence or deficit is rather indicative of a state of crisis. The use of this term to designate a specific mode of conflict management and resolution is, in fact, an abuse of language. It is generally any form of direct conversation between two people or two parties without them necessarily being in conflict. On the other hand, in the social sense of the term, dialogue designates the process by which two or more partner or rival actors join forces in order to find common ground through direct or indirect negotiation. Let us note that in the use of this word, there is above all the concern to distinguish two fundamental approaches: the peaceful way symbolized by dialogue and the violent way symbolized by force. In a dialogue, speech is fundamental. It is the support of communication between men and God thanks to its sacred character and to all the symbols that it conveys. Speech therefore has a real power over the protagonists rivalry (Mbeng Dang, 2004 :69).

Dialogue offers the protagonists a forum for consultation and discussion. It assumes a mutual desire to seek peaceful solutions to problems that are not necessarily of a conflictual nature, although this study focuses specifically on dispute management. When the conditions conducive to direct negotiation, otherwise known as dialogue, are lacking, they must be created. Intermediaries offer their services for this purpose. These facilitators who work discreetly or publicly to help the parties in conflict to dialogue one-on-one are called mediators. This process itself is mediation. According to Brand and Maurice Durrouset: “mediation consists of proposing a solution to the conflict to the parties.” This requires specific qualities from mediators since it is an extremely subtle art that has its own rules and on which its success closely depends. The qualities of a good mediator include: neutrality, impartiality, skill and patience, objectivity (Nguele, 1990 : 26).

Reconciliation is the ultimate state of restoring true peace, at best equal to that which existed between the parties who have become hostile. It is a stage which effectively allows the recreation of all the conditions of normality that the dispute has destroyed. It therefore consists of sustainably rebuilding peace by recreating trust and mutual respect between the former belligerents. Among the Bamiléké, reconciliation is a crucial stage in resolving the conflict. A set of subtle, effective and well-known mechanisms effectively serve to reconcile all the protagonists of disputes beyond the cessation of hostilities. These mechanisms are part of a logic of preparatory justice and mutual forgiveness. Women often play a decisive role in this reconciliation process. Friends, parents or any other close relatives actively participate in this enterprise. Reconciliation presupposes an affirmed and displayed will of the belligerents to follow the path of the peace of the brave. There is no question of using dissuasive means. The actors are faced with their conscience. Their commitment and their choice of measures to be taken must not be based on coercion. Warlike ardor no longer has its place once we embark on the path of reconciliation.

On the contrary, the first measures that are generally taken in the case of an armed conflict aim to demilitarize the belligerents. The troops are demobilized, the prisoners are reunited with their families. Tangible gestures of renunciation of war constitute the prerequisite. In other words, the management and resolution of the conflict are only a preliminary step. Shared will and a consensual spirit are major characteristics of

reconciliation. It is strictly speaking a peace of hearts and minds that cannot accommodate cheating or lies (Nguele, 1990 : 35). Convincing oneself and convincing is the motto. Everyone is placed before their moral conscience and before the ancestors or divinities. We can clearly see the influence death has on the consciousness, even the subconscious, of the Omvang man. What is remarkable is to realize to what extent, through love for one's own, the announced death becomes a catalyst for the resolution of disputes and reconciliation. There is a parallel to be drawn here between death and birth in Omvang country. It is not cynical to say that on the occasion of a birth and a death, a moment is created conducive to reconciliation. This exceptional moment is enthusiastic in the first case and pathetic in the second. It is quite striking to note that both of these major events give rise to tears and joy. Birth is a moment of peace and joy for those who welcome the newborn, but it is also a moment of pain and tears for the newborn himself, doubtless frightened by the misery of men. Death itself unleashes sobs, tears and sadness, but it is also a pathetic moment, of deep communion and a serious reminder of the duty to give meaning to one's life, to one's posterity, to one's survival or to life in general. This is why, like birth, death is an opportunity for much compassion and forgiveness that also require as many confessions and repentance.

#### **4. Conclusion**

The objective of this analysis was to show that the practice of diplomacy is not an emanation of the West and International Organizations, it has existed since in traditional African societies in general and Cameroon in particular like the Omvang people. They have established an effective traditional diplomacy for the promotion of peace. This history shows us that the Omvang society has experienced significant shocks with enormous influences on traditional conflict management systems. It shows us that conflict is inherent among the Omvang. The role of the types of mediators who intervene here is significant. The heads of families who embody the sense of authority within the restricted or extended family, they are not necessarily the oldest but, their role as father of the family means that they are considered as such. Their authority is exercised over all descendants, it is very beneficial for maintaining and promoting peace, also strengthens the capacities of each family to manage its conflicts in non-violence and without necessarily resorting to the central power of the chiefdom. The authority of the chief who seems the most distant is thus relayed by all traditional institutions. Finally, the woman is not a building block of traditional African societies, she is omnipresent, she is the nourishing, affectionate mother, the charming wife, advisor and associative confidante; she is also a work force, this is how she is strongly involved in the process of promoting peace and security through the game of matrimonial alliances, a real guarantee for the prevention of peace. But unfortunately, as in all of Africa, these traditional values will disintegrate with the arrival of Western colonization and its procession of acultural reforms which have come to erase this mutual respect and solidarity among the Omvang now subject to a framework of jurisdiction.

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# Note-Taking in Consecutive Interpreting: Techniques and Training Obstacles

**Sarra KHALFI**

PhD Student, Oran1 University Ahmed Ben Bella - Oran (Algeria)

Email: khalfi.sarah@edu.univ-oran1.dz

**Rachida BESSAFI**

Full Professor, Oran1 University Ahmed Ben Bella - Oran (Algeria)

E-mail: rachida.bessafi@yahoo.com

**Abstract:** *The note-taking process, as part of consecutive interpreting, is not only a technique but also a cognitive exercise that requires careful attention and rapid decision-making. One of the primary challenges is effectively teaching note-taking strategies to interpreters, especially as these techniques vary widely depending on individual needs and language combinations. The psychological demands of consecutive interpreting, particularly the mental fatigue and stress involved in simultaneous processing and memory retention, are often overlooked. These psychological factors can interfere with the effectiveness of note-taking, leading to difficulties in maintaining accuracy and coherence during interpretation. Addressing these challenges is essential to improving both the training and performance of consecutive interpreters in professional settings. The present work explores note-taking in consecutive interpreting in order to provide a brief but detailed explanation of the note-making process for students of interpreting.*

**Keywords:** *interpreting; memory; effort model; skills; note-taking.*

## 1. Introduction

Consecutive interpreting is one of the three modes that make up what we call conference interpreting (Gillies, 2017: 5). The interpreter listens carefully to the speaker for a period ranging from one to twenty minutes, and once the speech is finished, renders it into the target language (TL) using memory and short notes.

Prior to World War II, consecutive interpreting was the standard for all international meetings, as simultaneous interpreting — or the technology that enables it — had not yet been developed. According to Pöchhacker (2004: 18), it was only in the 1920s that transmission tools like digital recorders and microphones were developed to enable interpreters to work simultaneously.

Following World War II, simultaneous interpreting became increasingly popular, and by the 1970s, it had become the primary method used for conference interpretation. However, consecutive interpreting (CI) remains the fallback solution for simultaneous interpreters when their tools (recorders or microphones) fail (Gillies, 2017: 5).

CI is not only an important means of communication between speakers of different languages, but also an irreplaceable tool in teaching conference interpreting. It precedes the teaching of simultaneous interpreting in all existing interpreter training programs.

## 2. Historical Overview of Consecutive Interpreting

The first recorded instance of consecutive interpreting at an international event occurred in 1919, at the Paris Peace Conference. Since then, it became the standard mode for interpreting between two official languages at the League of Nations. Linguists recruited for this task demonstrated high levels of concentration and language mastery, rendering long speeches from the source language into the target language with accuracy.

In the 1950s and 1960s, several legendary interpreters were able to render speeches of up to half an hour from memory, without relying on notes (Gillies, 2017: 7). Other sources mention the anecdote of an English consecutive interpreter who flawlessly interpreted a one-hour speech from French to English, without a single error or omission (Ito, 2017).

Historical sources note that early challenges in note-taking during CI arose because professional bilingual linguists were improvising interpreting without formal training. In response to the increasing demand for reliable professional interpreters, serious efforts were made to develop structured training programs. The European Union established a linguistic service, and pioneers such as Danica Seleskovitch and Marianne Lederer were tasked with conducting research to design the first formal interpreter training program. In 1958, they became the founders of ESIT — the first interpreting institute grounded in the principles of "interpretation theory," based on their extensive experience in conference interpreting.

On the other hand, Jean-François Rozan wrote his influential book *La Prise de Notes dans l'Interprétation Consécutive*, which remains the ABC of consecutive note-taking, regardless of the working languages of interpreters. The techniques of verticality, shifting, and the importance of linking words remain foundational to consecutive note-taking. Rozan's compilation of techniques, inspired by actual interpreters' notes, continues to influence the field. However, his work focuses on what to note in consecutive interpreting, but does not address the how, particularly the psychological and cognitive aspects of the process.

The number of translation and interpretation institutions has grown considerably in response to the increasing demand for formal academic training. Kelly and Martin noted that by April 2006, 380 translator or interpreter training programs were being offered by universities in 63 countries, compared with only 49 such programs in 1960. For example, interpreter and translator training programs are now provided by most, if not all, universities in Hong Kong (Yan, Pan, & Wang, 2018: 11).

Today, consecutive interpreting classes represent a cornerstone of most graduation programs in interpreting. Students begin with CI, where they learn to interpret using short notes as an external memory aid. In many universities, students who do not pass the CI exam are not permitted to advance to simultaneous interpreting programs.

### 3. Strategies for Note-Taking

Although consecutive interpreting has been practiced and discussed for a long time, it is still perceived as a relatively new area of study within the field of translation. While note-taking remains a highly personal and individual technique, several studies have attempted to define what kinds of techniques are most effective and how to teach them in interpreter training programs.

Consecutive interpreting branches into two types:

- **Short consecutive**, which consists of short sentences that do not require note-taking to recall their clear and concise ideas.
- **Classic (long) consecutive**, which involves listening to a speech lasting from one to twenty minutes and reproducing it in the target language using a combination of memory, notes, and general knowledge. The duration of speeches in CI has significantly decreased in modern times. In the mid-20th century, speeches could last from twenty minutes up to an hour (Rozan, 1956).

According to Gillies, the perception of note-taking is that there is no single way to note a source speech. However, he conducted a study presenting various strategies for note-taking in training programs and emphasizes that:

- The way a student takes notes will have an enormous impact on the success of their interpretation.
- Not knowing how to take notes—and the detrimental effect this has on performance—may discourage students from joining the profession before they even get started.
- Alternatively, once students complete their training and begin working, poorly structured notes may prevent them from reaching their full potential as interpreters.

Unlike Rozan, Gillies was one of the first authors to give implicit attention to cognitive and psychological factors in his book. Analyzing Gillies leads to the conclusion that he also supports Daniel Gile's Effort Model, which aims to help consecutive interpreters improve their performance.

Consecutive interpreting involves two key phases:

- In **Phase 1**, while the speaker is speaking, interpreters must listen, analyze, take notes, and use their short-term memory—all simultaneously.
- In **Phase 2**, while delivering the interpretation, they must read from their notes, recall information, and produce the target-language version accurately.

A common challenge, especially for students but also for experienced interpreters, is managing these simultaneous tasks effectively during Phase 1.

Gillies addresses issues such as the impact of active listening during the speech and proposes strategies to enhance working memory. Some of his strategies include:

#### **a. Macro Thinking**

- *Macro-reflection* means looking at the big picture. Words, expressions, and ideas belong to the micro-level; structure, framework, and the way a speech is constructed pertain to the macro-level (Gillies, 2017: 8).
- The ideas in a discourse are interconnected—logically, chronologically, or in terms of relative importance.
- Interpreters learn to recognize common speech patterns, allowing them to record their analysis clearly and quickly in notes. Their notes become a visual representation of their understanding of the source discourse.
- Notes should be at least as clear as the preceding analysis; otherwise, the analysis is wasted. In general, notes will be better structured than the original speech, allowing the interpreter to convey the message more effectively to the audience (Gillies, 2017: 9).

"In fact, not hearing something is much more common among student interpreters than not understanding it. You don't hear because you're concentrating too much on deciphering the original or on taking notes. The overload makes you functionally deaf for a moment." (Gillies, 2017: 9–10)

Listening makes analysis possible; good analysis leads to clearer, quicker notes. Conversely, a good note-taking system supports analysis. Ultimately, effective analysis and note-taking promote short-term memory performance (Gillies, 2017: 10).

As Viaggio notes, the ability to analyze is the cornerstone of understanding and the basic skill an interpreter must possess (Cheung, 2008: 3).

#### **b. Mind Maps**

A mind map can be any type of diagram—pictorial, graphic, or textual. It is a way of organizing information on a sheet of paper. The central idea is placed at the top, and related ideas branch out from it.

To create a mind map, the student must understand and analyze the incoming speech. This process is especially useful for interpreters, as drawing a mind map forces deeper engagement with the speech and leads to more attentive listening. The resulting diagram provides:

1. An overview of the entire speech on a single page.
2. A visual representation of how the various parts of the speech fit together.

“It is a great analysis exercise!” (Gillies, 2017: 21)

#### **Mind Maps as a Potential Note-Taking Tool:**

- **Temptation:** Mind maps appear beneficial but may not suit all note-taking scenarios in CI.
- **Limitations:**
  - Mind maps are designed to represent an entire speech on one page.
  - Interpreters do not know the speech length in advance or which sections will require more focus.
  - Managing space becomes difficult.
- **Suitability:**
  - Not all speeches lend themselves to mind-mapping techniques.
  - Personal preference plays a role—mind maps may not align with everyone’s style.
- **Recommendation:**
  - Use mind maps primarily as an analysis tool, not as the main note-taking method in consecutive interpreting (Gillies, 2017: 24).

#### **c. Section Diagram**

Section diagrams are a continuation of the strategy of dividing a speech into parts. The interpreter must identify the main ideas, then recall them in the target language. Once the learner has broken the speech into sections, they can further divide it into subsections, mapping each one on the page. For every section and subsection, a single keyword should be noted.

A section diagram can serve as a note-taking tool for short or easily memorable speeches. It offers a general outline of the speech without detailed content (Gillies, 2017).

#### **d. Mini Summaries**

Summarizing exercises are sometimes used in CI (Consecutive Interpreting) teaching as preparatory steps, since new students are not expected to master note-taking immediately. Instead, they should progress gradually—starting with short paragraphs and slowly reducing the number of words or symbols they jot down. According to Cheung (2008), this method is intended to **boost** students’ understanding, help them analyze the speech, and improve their recall abilities. For this reason, instead of asking students to proceed directly to full-fledged note-making, it is often more appropriate to begin with summarization techniques.

Gillies (2017) argues that summarizing is a very important skill for students. Even though they are not usually asked to summarize formally, they are quite capable of doing it effectively. He states that:

“It is an exercise in analysis; it’s a question of deciding what is very important and what is less important. And that is going to serve us well when note-taking and interpreting consecutively (and interpreting simultaneously).” (Gillies, 2017: 32)

In terms of note-taking, mini summaries serve as an invaluable fallback

option. When the speech is delivered rapidly and taking detailed notes is not feasible, it becomes essential to concentrate more attentively and jot down only a brief summary for each segment. If the summary is well-chosen, it will be sufficient to trigger recall of the rest of the content — what Seleskovitch and Lederer describe as *latent memory*. Even if the summary does not capture everything, offering a condensed version is preferable to providing inaccurate information or leaving gaps (Gillies, 2017: 33).

There is, however, no statistically significant evidence to confirm that constant summary exercises improve CI skills. The performance scores of two test groups indicate that the experimental group outperformed the control group, but the lack of statistical significance could be attributed to the relatively small sample size. It would be valuable to conduct a similar experiment with a larger sample (Cheung, 2008: 14).

#### 4. Note-Taking Challenges for Professional Interpreters

Saleh A. (2022) conducted a study on the challenges of note-taking in consecutive interpreting. The research clearly targeted professional consecutive interpreters, aiming to gather and highlight the main difficulties and obstacles they encounter during their practice.

In this study, Saleh provides a comprehensive overview of the challenges and their causes, offering professionals the opportunity to identify the origins of common issues and, consequently, to develop strategies for avoiding them in the future.

These challenges are classified into three main categories: **linguistic**, **cultural**, and **paralinguistic**.

##### Linguistic Challenges

Linguistic difficulties involve syntactic, semantic, phonological, and prosodic aspects:

- **Syntactic challenges** refer to grammatical differences and sentence structures across languages. For example, Arabic sentences often begin with a verb, whereas English or French sentences typically begin with the subject.
- **Semantic challenges** are linked to lexical incompatibilities, including:
  - Specialized terminology used by certain professional groups;
  - **Neologisms** (newly coined words or phrases);
  - The adoption of new meanings for existing words.

##### Paralinguistic and Psychological Challenges

Paralinguistic and psychological difficulties arise from the broader context in which the speech is delivered. These may include:

- The speaker's tone, volume, and delivery style;
- Psychological constraints such as interpreter fatigue, nervousness, or shyness.

These factors can lead to **omissions**, **hesitations**, and **time-lags** in the interpretation process.



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# The Perception of Young People Regarding Marriage and Cohabitation

**Iulia NEȘA**

PhD, West Univeristy of Timișoara (Romania)

Email: iulia.nesa02@e-uvvt.ro

**Mariana BALACI**

PhD, West Univeristy of Timișoara (Romania)

Email: mariana.balaci@e-uvvt.ro

**Abstract:** *Marriage can be seen as a positive factor, for many this covenant symbolises a deeper commitment than a cohabiting relationship as well as a promise of affection, loyalty and support. After marriage you may be viewed differently by certain people or in certain situations. There's a general idea that after marriage there are certain responsibilities, or that people mature and become more cautious, more receptive. Today's relationships evolve much faster, in the sense that young people decide after a short period of time to move in together, but before moving in with a person, you have to get to know them, get to know their habits, see if you agree with them or if you tolerate them before you agree, and you can only get to know these things after spending a long period of time with a certain person. In general, there is a tendency among young people to prefer more flexible and less formal relationships, such as cohabitation, which allows them to live together and share a life without the legal obligations of marriage. Concubinage offers a certain freedom and independence, allowing couples to organise their lives together in a way that best suits their lifestyle. On the other hand, married people mentioned that two life partners should first and foremost be friends, in terms of getting to know and understand each other.*

**Keywords:** *Marriage; Cohabiting; family; youth; Romania.*

## 1. Introduction

In the last decades of the 20th century, regardless of the areas of interest, most researchers agree that the family has changed not only in form and content but also in significance, reflecting the social changes driven by contemporary societies, particularly in the West. Therefore, the term now transcends traditional definitions and encompasses a wide range of realities. In recent years, there has been increasing discussion about alternative family lifestyles, including consensual unions (Bădescu et al., 2007). An objective analysis of the term "cohabitation" reveals significant differences between couples who live together without intending to legalize their relationship through marriage and those who live together without such intentions (Popescu, 2010).

In recent years, people's concerns have begun to focus on homosexuality and divorce, even though marriage remains the most valued and important institution in society. These trends have changed the way people think, placing greater emphasis on the diversity of individual life rather than on marriage and its associated values. However, various new phenomena have also emerged recently, such as abortion, remarriage, stepfamilies, joint custody, as well as families of homosexuals and lesbians. There are a variety of reasons that have contributed to these significant changes in people's thinking about family, which are closely linked to how individuals behave within the family (Lindsay & Dempsey, 2009).

A significant number of young people prefer to live together without obligations to each other. Young couples or individuals who are hesitant to formalize their relationships again are the ones who adopt this lifestyle. Cohabitation has become a form of living together in most developed countries.

Marriage, from the perspective of young people, represents the beginning of a couple's life as a family (Olari, Ganța & Munteanu, 2013). From the moment of marriage, the couple's relationship becomes a family and is accepted before God in Christian religion, as well as in front of society through civil marriage. This can be seen as a legal conclusion of the marriage contract between two partners.

Many studies show that some young people consider living together with their loved one before entering into a legal union through marriage to be a normal and beneficial process for the relationship. A positive aspect in this regard is that you get to know your partner much better, thus representing an advantage in the relationship (Mitrofan & Ciupercă, 2002).

Young adults are increasingly opting for cohabitation without marriage, and the fertility rate has decreased significantly. The study emphasizes the influence of global values and culture on these lifestyle choices (Ng, 2019). For individuals in a cohabiting relationship, a marriage license is not necessary as long as they have feelings for each other, even without this bond. Although a couple may be in a cohabiting relationship as a step before marriage, it does not necessarily mean they will get married; this is a decision each couple makes individually. Most young people in consensual relationships have not yet reached the legal age to appear at the civil registry office, yet "the right age for marriage is simply a cliché." When a couple discovers that they fit well together, they want to embark on a new stage, namely marriage, with cohabitation typically serving as a precursor to marriage (Klaus & Stoiciu, 2014).

In most cases, legal aspects significantly impact a couple's decision to remain unmarried and live in a cohabiting relationship. Marriage comes with various legal obligations, while cohabitation is not recognized as a legal form of living together (Olari, Ganța & Munteanu, 2013). There is growing interest in studying family from a sociological perspective regarding the correlations between perceived satisfaction and relationship stability, even though these aspects remain unclear, varying according to demographic factors, types of relationships, and personal characteristics. In the context of recent sociological trends, such as the increase in cohabitation, particularly among young people, there is a noticeable delay in the age at which young individuals accept marriage (Pokorski & Kuchciewicz, 2012: 191-192).

However, public opinion has begun to consider the way of living together with a loved one, coinciding with the rise in the number of people choosing this method of cohabitation. Ultimately, the form of living together through consensual unions will exist regardless of how much we oppose it. Furthermore, people live together and feel so satisfied and well-suited that they do not feel the need to unite their destinies, even though they are aware of the negative effects of cohabitation (Bulgaru & Chistruga, 2015).

Cohabitation represents a long-term relationship between a man and a woman who are not married but live together and establish functions similar to those of spouses. In religious traditions, the term cohabitation is analyzed in terms of ethics and morality. It seems that young people in Romania prefer to live in cohabitation rather than consider the idea of marriage. This is often attributed to a change in mentality, as well as to the political and economic instability in Romania over the past few decades, which has led to a deterioration in the social, economic, and moral state of young people.

People mature more slowly as marriage is delayed, but they dedicate more time to education and personal development (Lindsay & Dempsey, 2009). Often, young married individuals use marriage as a way to center their individual interests within the marital convention. This trend shows that spouses establish preventive financial securities, leading to a new orientation of couples. Legislative provisions also encourage this trend, as they allow partners to focus more on themselves, prioritizing personal well-being over that of the family. Consequently, the concept of protecting personal assets arises from the idea that offering love and passion to a partner is more of a risk than a demonstration of faith/trust in a couple's relationship (Apostu, 2016: 66).

In a traditional marriage, it can be observed that the roles of men and women involve both the responsibility of managing public life, business, and politics, as well as the role of a father, which provides a superior attitude and increased self-confidence. The role of women in traditional marriage is appreciated, involving the care of the husband and children (Popescu, 2009).

Often, cohabitation offers partners more flexibility as they are not constrained by the legal obligations of marriage, thus facilitating much more open communication and negotiation regarding roles and responsibilities. However, the absence of a legal bond can sometimes create uncertainties regarding the future of the relationship, causing stress and emotional instability (Lemmencier, 1978).

On the other hand, marriage represents both a social and legal commitment, providing a more stable foundation for the relationship. It involves several well-defined roles and responsibilities, thus aiding in better organization and functioning of the relationship.

At the European level, we find that cohabitation is increasingly becoming a more frequent alternative to marriage, especially in Scandinavian countries, although perceptions of its role vary significantly (Klüsener et al., 2013; Perelli-Harris et al., 2012). Qualitative research (Perelli-Harris et al., 2014) has sought to clarify the changing meanings of cohabitation. Unlike the situation in Europe, in the United States, cohabitation is often seen as a precursor to marriage and as an alternative option to marriage like that in Europe.

Currently, young people are much more open to consensual unions, and future generations may consider cohabitation to be a legitimate and legal form of living together. It is very likely that in the future, legislation will evolve to protect and recognize various forms of union, including cohabitation, civil partnerships, and other forms of consensual unions (Iluț, 2015).

In this regard, family values have undergone significant changes with each generation, and today young people no longer consider marriage necessary. Analyzing family developments is a very important factor, as it explains the changes in family behavior from one generation to another (Inglehart, 1997).

Cohabitation and marriage offer different advantages depending on individual preferences and circumstances. As all these legal and social norms evolve, changes may occur in how the two forms of union are perceived and treated.

## **2. Research Methodology**

To achieve our objectives, we chose to use qualitative research, a type of research increasingly employed in specialized works, which also helps me identify in-depth aspects of the research topic I have chosen. Qualitative research is formulated in general terms, allowing for a flexible, exploratory investigative process. This type of research provides us with the opportunity to gain a deep understanding of what lies behind the responses

received from the young people interviewed.

“The research instrument I have chosen for my work is the interview, which is a commonly used tool in qualitative research.

The general objective of our research is to capture the respondents' perspective on young people's choices when discussing their emotional relationships: do they prefer cohabitation or marriage? This highlights several essential specific objectives that can be derived from the interview questions, as follows:

1. The main objective is to identify and understand young people's choice between a cohabitation relationship and marriage, their perceived differences between the two, as well as their personal opinions.
2. To understand the main factors that underpin understanding, respect, communication, and good mood among young people in both cohabitation and marriage.
3. To identify and develop the elements that form the basis of the concepts of cohabitation and marriage based on the responses of the interviewees from the young couples.

The individuals I selected for the interviews are young people in cohabiting relationships, as well as young married individuals for approximately 2-4 years. Ten people were interviewed, and the subjects were randomly distributed; thus, 3 interviewees are young married individuals aged 25-29 years, married for 1-4 years, while 7 interviewees are young individuals in cohabiting relationships aged 22-28 years. The interviews were conducted both via phone and in-person, and they were recorded. The data collection period was from March 14 to March 20, 2024. The respondents are from urban areas in the western part of Romania.

### 3. Research Results

An overview of the respondents is provided in the following table:

Interviewees	Married/Cohabitation	Living environment	Age	Gender	Professional status
Interviewee nr.1	Cohabitation	Urban	28 ani	Female	Lawyer
Interviewee nr.2	Cohabitation	Urban	26 ani	Female	Lawyer
Interviewee nr.3	Married	Urban	29 ani	Female	Lawyer
Interviewee nr.4	Married	urban	27 ani	Female	Teacher
Interviewee nr.5	Cohabitation	Urban	26 ani	Masculine	Legal advisor
Interviewee nr.6	Cohabitation	Urban	26 ani	Female	Legal advisor
Interviewee nr.7	Cohabitation	Urban	22 ani	Masculine	HR Specialist
Interviewee nr.8	Married	Urban	25 ani	Female	HSE Specialist
Interviewee nr.9	Cohabitation	Urban	22 ani	Female	Student
Interviewee nr. 10	Cohabitation	Rural	23 ani	Female	Student

During the interview, through the interview guide used, I focused on the following aspects:

1. The current situation and the development of the relationship in the near future.
2. Changes and differences that have occurred both in cohabitation and after marriage.
3. Awareness of the most important values in the relationship.
4. Perspectives on different perceptions regarding cohabitation and marriage.
5. Advice for young people in a consensual relationship.

### 3.1. Current Situation and Relationship Development

The interview subjects are individuals who are in both cohabitation and marriage: *"My name is Diana, I have just turned 28, (...) and as for my personal status, I am unmarried and in a cohabiting relationship, but this year, specifically on June 1st, I am set to officially marry the person I've been with for about 12 years."* (Interviewee 1), *"My name is Aura, I am 26 years old (...), I have been in a cohabiting relationship for over six years with my partner."* (Interviewee 2), *"Hello, my name is Oana, I am 29 years old, (...) my husband and I have been together for about 15 years."* (Interviewee 3), *"My name is Andreea, I am 27 years old, and I have been in a relationship for 12 years, but I have been married for 1 year to my partner."* (Interviewee 4).

Regarding the description of the relationship in which the subjects find themselves with their partners, they mentioned that it is based on certain important values that help maintain the relationship, namely: love, respect, trust, communication, and friendship: *"We understand each other well; we are like two friends, so to speak, thus we have a relationship based on trust and friendship. We support each other, we enjoy doing things together, although I admit that sometimes we argue and there are quite frequent disputes, but we try together as much as possible to overcome the more tense moments through communication."* (Interviewee 5), *"We can characterize our relationship as one of love. That's why we are a couple; we are friends first and foremost, we are very communicative, and we try to get through all the obstacles we encounter together throughout life."* (Interviewee 6), *"I can say that I get along very well with my partner; I feel much more at ease when we are together, I mean, I have this state of well-being, I feel extraordinary that I found a person with whom I can share both difficult and beautiful moments."* (Interviewee 7).

In the case of Interviewee 3, the relationship with her partner was formed back in their teenage years, with communication being the key to success in their couple's relationship, thus overcoming all challenges that arose over the years: *"I was in the 9th grade and he was in the 11th grade; we were practically kids when we met. Since then, we have stayed together and built our relationship step by step; we have gone through all the pleasant and less pleasant changes that everyone goes through in adolescence. (...) Communication has helped us maintain the relationship."*

I found that both married individuals and those in a cohabiting relationship have mutually agreed to take the next step of moving in together when both partners were ready, with the main goals being the completion of professional studies and financial stability: *"Even though we had been together for a long time, we didn't rush into this step; we let the college period pass, to gain more resources, and then we moved in together."* (Interviewee 10), *"It has been 4 months since we have been living together, and I can say that I am currently very at ease with my decision; I am glad we took this step, and maybe we could have done it earlier, but I regret nothing because everything in life happens for a certain reason."* (Interviewee 8) *"The decision to move in together came after we finished*

*our studies, more specifically after a period. I think it was about four years or so when this common idea of living together came up.*" (Interviewee 9).

Current relationships evolve much more quickly, in the sense that young people decide to move in together after a short period of time, but before moving in with someone, you need to know them, understand their habits, and see if you agree with them or if you can tolerate them before you agree to it, and you can only learn these aspects after spending a significant amount of time with a particular person.

Interviewees in a cohabiting relationship mentioned that it very much depends on the relationship each partner is in, specifically their personal situation regarding the activities they undertake, their financial and emotional stability, as well as the level of evolution of the relationship they have: *"But personally, I don't think it's necessary to say that a specific period of time must pass, I don't know, a year, months, or so on; it doesn't seem wrong to me for the period to be long, nor for the period of time to be short before marriage intervenes."* (Interviewee 2), *"I believe that after a longer period, it is good to take this step; I don't say this out of convenience or the comfort of getting used to another person, but from the perspective that these moves or changes are not beneficial for anyone. For example, if after two or three months you choose to move in with someone and find that the person is not what you wanted, it inevitably becomes work because you must move all your things from that person, and inevitably comes the natural consequence, namely that you must readjust."* (Interviewee 1), *"I believe that a significant amount of time needs to pass to gain the necessary life experience, to get to know your partner, to know yourself and your partner, to gain some maturity in the relationship before taking the step toward marriage."* (Interviewee 5)

It is absolutely necessary, in addition to the time period, for them to have a certain degree of maturity and to be very aware of everything that the new stage, which their relationship will have to go through after the conclusion of a marriage, entails.

### **3.2 Changes and Differences in Cohabitation and After Marriage**

Regarding the changes that occurred in the relationship after marriage, the interviewed individuals mentioned that there were none. The fact that they had been a couple since their teenage years meant that nothing new and unprecedented happened between them; they simply decided to take the next step since they had a stable relationship: *"As far as our relationship is concerned, no, because we have been together for too long for changes in the relationship to occur. We got married after 14 years together. I believe everything happened in a natural and normal way; we consider we have always formed a family."* (Interviewee No. 3). It can be said that marriage remained at a symbolic level for all newlyweds; changes occurred in civil status documents, but also through the appearance of the symbol of the bond of love, as was the case with Interviewee No. 8 and Interviewee No. 4: *"If we can call it a change, wearing a wedding ring after marriage, in my case, is not new since I have always worn rings; now I wear the wedding ring daily, just like my husband. For him, it seems more like a change because he never wore rings before marriage."*, *"Besides having a document that proves we are a family and that I am under his name, we love each other just as much."* After marriage, you may be viewed differently by certain people or in certain situations. It's as if you've moved to another level in life, even though practically nothing has happened in a physical or material sense. It is merely about the covenant between two people. Generally, there is a common perception that certain responsibilities arise after marriage, or that people mature and become more cautious and receptive. I observed that there are no major differences between the two types of relationships, other than those concerning the civil status of individuals and the legal regime of property acquired after marriage, in the case of legal community: *"There is a*

*small difference that I believe should be treated legally; a married person enjoys more rights than an unmarried person, even though cohabitation in Romanian legislation has somehow been assimilated to marriage relationships, respectively the relationships of kinship between spouses or between cohabitants, regarding aspects related to the property rights of each spouse or cohabitant (...)*” (Interviewee No. 5), *“A difference comes to mind, but at a legal level, indeed, cohabitation is not regulated in national legislation. Legally, only from the moment the civil status officer hands over the marriage certificate can it be said that there are equal rights in the couple and that partners owe each other respect, fidelity, moral and material support.”* (Interviewee No. 3), *“There is not a very big difference between marriage and cohabitation, because in both forms of living together these values must exist (...), and regarding marriage and the differences I see, it involves a series of new rights and obligations (...), it involves new rights from a legal perspective, new protections that the state also provides to protect young married couples and somehow support this institutionalized framework of marriage.”* (Interviewee No. 2) It is the right of each person to decide their own paths in life and to make their own decisions. Both during cohabitation prior to marriage and during marriage, the relationship between partners must already have well-defined values. Each of them must be aware of the reciprocal implications they must have in that relationship for it to function, because no relationship works without implication, whether it is a cohabitation or marriage relationship. Both forms of cohabitation involve mutual respect and love.

From the perspective of married interviewees, they mentioned that responsibilities have not changed with the transition to the next step, namely marriage: *“As far as we are concerned, we have always lived the same way. We have always shared responsibilities according to each person’s capabilities, so that it goes well for us and to avoid unpleasant situations or difficulties.”* (Interviewee No. 3), *“We have always been the same, without any change.”* (Interviewee No. 8). As long as two people willingly choose to be together, they should be together in good times and bad, regardless of what life brings them. A relationship cannot exist without responsibilities because, practically, that is what it should entail. Responsibilities arise with the relationship, not just when signing the marriage certificate. On the other hand, individuals in a cohabitation relationship believe that with the transition to the new stage of marriage, greater responsibilities arise in the relationship because attention is distributed to multiple plans, and it is necessary to create a good relationship between the personal and professional spheres: *“Yes, absolutely. I do not contest that responsibilities would not change; I believe that as we grow older our responsibilities increase, and also responsibilities increase not necessarily when you age but when you become aware that you are standing on your own feet and have to assume the status of an independent person and make certain decisions.”* (Interviewee No. 1), *“Yes, after marriage, I believe that somehow our responsibilities change, not in the sense that the responsibilities we had before disappear, but that they intensify, new situations arise in our lives, new impediments, new events.”* (Interviewee No. 2). In the case of Interviewee No. 6, he mentioned that responsibilities will arise when they decide to have a child: *“Responsibilities at the moment you get married, I do not believe they necessarily stem from the relationship you have with your partner, and rather responsibilities arise when a child comes into play.”* Responsibilities do not represent the less pleasant part of life as a couple but are a part of life and are necessary to coexist in a healthy manner.

### **3.3 Awareness of the Most Important Values in the Relationship**

Communication is the most important factor in maintaining a healthy relationship; the importance of communication is fundamental, considering the consequences produced by insufficient or ineffective communication, or by a lack of



communication. We can observe that both individuals in a cohabitation relationship and in marriage have mentioned that the moral obligation in making any decisions should involve the life partner and take into account their desires or needs.

The quality of family life is determined by the quality of communication between partners; how the two share their thoughts, express their feelings, seek advice, or participate in decision-making together is very important: *“Yes, effective communication helps those involved in a relationship to understand each other better and express their needs and expectations. Through effective communication, conflicts can often be resolved in their early stages, thus they reach the point of arguing or separating in the worst cases.”* (Interviewee No. 5), *“But yes, I believe that the foundation or basis of a healthy, long-lasting relationship, an everlasting relationship is communication. Communication is, so to speak, one of the most important reasons for choosing to be with a beautiful person; beauty is fleeting, but if you find in your partner a comrade, a friend, a person with whom you can communicate, I believe that is above all.”* (Interviewee No. 1), *“Yes, honestly, I consider that communication is the foundation of any type of relationship, especially in a couple relationship, where there are certainly different opinions, we have different perspectives, we see things at a certain moment differently. You need to know very well your partner's vision and opinion for the situations that arise in the couple and vice versa; I believe I also need to know their motives and opinions and how each situation that arises every day in our lives is seen to understand their point of view. If such communication were defective or did not exist, all new situations would somehow become conflictual and uncomfortable for both.”* (Interviewee No. 8).

In the case of Interviewee No. 2, communication was a key factor in their relationship, helping to develop and strengthen trust: *“Communication is an important foundation in a relationship, and yes, it is also a foundation in our couple's relationship, as well as a factor that, in my opinion, I believe helps a lot with trust in a couple, both the trust that each partner has in themselves and the trust that partners have in each other.”*

Communication is often considered the cornerstone of any relationship, whether it is cohabitation or marriage; it is the element that allows partners to share thoughts, feelings, fears, and contributes to the growth of mutual understanding and intimacy.

Regarding the topics of discussion that the interviewees have with their partners, they mentioned that the main themes of conversation are related to daily chores, as well as each person's views, their passions, and their personal plans as a couple: *“We talk a lot about travel, having this common passion; I love to travel, and so does my partner. We often make plans for a new trip or share stories, and we travel both together and separately. I travel with my friends or family, during a time when he might not be able to go due to work or other daily activities, and we talk a lot about these events in our lives.”* (Interviewee No. 6) *“The topics we choose to discuss are already part of our routine, because having been together for so long and debating, I think we have discussed all the topics we could debate (...), we have started to have the most mundane topics, such as what we are eating today, when we set the cleaning day, when we are going shopping, or visiting our families (...), we spend time together, watch a good movie, or simply go for a walk, go to the mall, or find all sorts of activities that we both enjoy participating in because we see the relationship as one for the future.”* (Interviewee No. 10).

On the other hand, married individuals mentioned that two life partners must, above all, be friends, in terms of knowledge and mutual understanding. When you don't communicate everything you feel or think, you realize that you don't truly know the other person because you don't know what they think; but certainly, the other person doesn't truly know you either because they haven't been given that opportunity: *“Regarding communication in my marriage, I believe that my husband and I have managed to remain*

*unchanged toward each other for so long precisely because we have communicated effectively in any situation, and in this way, we have managed to know and understand each other very well."* (Interviewee No. 4).

When communication is lacking or not utilized to its full potential, rifts can occur in the relationship related to mutual understanding between life partners, patience, and tolerance—elements that are very important in any relationship, not just in cohabitation or marriage. When we do not communicate sufficiently, we cannot form a clear idea about the experiences, feelings, frustrations, happiness, or unhappiness of the other person, and this is why the resolution of all problems lies in communication.

### **3.4 The Vision on Different Perceptions Regarding Cohabitation and Marriage**

I have observed that individuals interviewed who are in a cohabiting relationship consider that marriage no longer represents the same phenomenon among the population as it once did; rather, it is seen as freedom, a choice, a union formalized by an act, which does not bring about changes in the couple's life: *"I believe that marriage, in terms of social status, does not change anything; being married or unmarried does not alter your situation. However, it seems to me a natural and logical step when you choose to marry, implicitly choosing for your life to take a different course, in the sense that I could not, at least that is my perception."* (Interviewee No. 9) *"I do not believe that the next step, namely marriage, would change anything in our relationship (...) we have somehow always thought about these things before doing certain things, without being married; I mean, I think it depends on each person's nature to choose how they behave in a couple, regardless of whether they are married or not."* (Interviewee No. 7)

People no longer feel the need to adhere to certain social norms considered outdated concerning relationships. One can live just as normally in a cohabiting arrangement, especially regarding the rights of children born out of wedlock and the regime of assets. Thus, anyone can have a relationship with whomever they choose, without feeling the need or obligation to marry.

In the past, marriage was viewed as a strategy for personal and familial development, economically and socially, and those who married gained more civil rights. For Interviewee No. 4, marriage comes as a covenant between tradition and the maturation of the relationship, a concept passed down through generations: *"Tradition somehow is born, as you know from the past; we have this conception passed down from our parents and grandparents, and we somehow take over this tradition, and it is an event that the extended family certainly looks forward to regarding each young couple."*

There are several stages that must be traversed for a relationship to become solidified and for one to eventually move on to cohabitation or marriage. There does not necessarily have to be a hierarchy between marriage and cohabitation, nor does one have to follow the other; marriage is somehow a public formalization of the relationship that the partners have. It is a festive event in every relationship through which the partners take public responsibility for the new stage they are about to go through, as was the case for Interviewee No. 3 and Interviewee No. 2: *"In my opinion, the relationship must be well-established before the moment of marriage, and I believe this is done by going through all the normal stages of a relationship, starting from mutual knowledge of the partners, understanding each other's passions, discovering common interests and concerns," "For me personally, the foundation of a family seems somewhat formalized by society; I believe that the family between the two partners is more a feeling than necessarily a status; I appreciate that establishing a family should be a mutual decision made before marriage, with marriage serving to officially mark a festive framework for all the moments experienced."*

Marriage can be seen as a positive factor; for many, this covenant symbolizes a deeper commitment than a cohabitation relationship, as well as a promise of affection, loyalty, and support.

A large portion of interviewees, both those in cohabiting relationships and those who are married, mentioned that the preference of young couples between cohabitation and marriage can vary based on several factors, including cultural context, personal values, and individual priorities. In general, there is a trend among young people to prefer more flexible and less formal relationships, such as cohabitation, which allows them to live together and share a life without the legal obligations of marriage: *"Among young couples, there is a general reluctance regarding marriage, meaning they are more discreet and adopt the idea of cohabitation more quickly than the idea of marriage (...), precisely out of fear of new responsibilities. Somehow, the implications that this new stage entails reflect in each of us, and here I refer to the situation where if you do not have a certain degree of maturity, you will certainly not be able to think further about a marriage relationship, and automatically, you will think about a cohabitation relationship."* (Interviewee No. 3) *"Yes, and it seems that the current trend is towards cohabitation, while the institution of marriage seems somewhat outdated, in the sense that it is no longer considered, and here I can quote, 'an act that binds us to something.' The vision is somewhat limited and not necessarily aligned with reality."* (Interviewee No. 1) *"(...) I believe that young couples somehow prefer cohabitation relationships over marriage, and somehow the lack of maturity and the restriction of freedom makes young people choose to remain in a cohabiting relationship."* (Interviewee No. 4)

On the other hand, cohabitation offers a certain degree of freedom and independence, allowing couples to organize their lives together in a way that best suits their lifestyle. They seem to have a certain level of skepticism towards people, preferring to get to know someone deeply before advancing the relationship to another level; they fear the unknown and surprises and tend to avoid them: *"Most young people prefer to experiment and meet as many people as possible before starting and being in a serious relationship."* (Interviewee No. 7), *"Young people, I believe, tend to opt more for diversity, in the sense that they want to know as much as possible, to experience as many things as possible, and this aspect is not to be condemned or contested as long as its outcome is a positive one or at least a correct one, (...) no one is saying not to travel, not to discover, not to experiment, but as long as all these things are done in a positive tone and in a way that helps you evolve."* (Interviewee No. 9) Ultimately, the decision between cohabitation and marriage depends on the personal preferences of each couple and how they wish to structure their relationship. It is important for each couple to consider all legal, financial, emotional, and social aspects before making a decision.

### **3.5 Guidelines for Young People in a Consensual Relationship**

For a harmonious relationship, each partner must have the desire to make things work. Cohabiting partners should respect each other's opinions, plans, and perspectives regarding existing situations, as well as new circumstances that arise both personally and professionally in life. Mutual respect is the main essence of a relationship. Interviewee No. 1 claims that advice from an expert during tense moments can help resolve issues: *"I believe that the best advice doesn't necessarily come from an uninformed person, but from a psychologist when we face difficulties in the relationship."*

In the case of interviewees in cohabiting relationships as well as those who are married, they assert that communication is sufficient in a relationship; the partner, whether a cohabitant or a spouse, should be able to communicate with you in a way that helps you overcome that moment: *"I think the best advice is that when one of us encounters*

*a problem, we should be able to communicate, specifically to discuss what hurts us, what bothers us, not just what bothers us in our interpersonal relationship, but all the problems we face, whether we are talking about work or our relationships with friends.”* (Interviewee No. 10), *“I truly believe that communication is what helps the most in building harmony in a relationship.”* (Interviewee No. 2)

One of the suggestions proposed by Interviewee No. 3 for unmarried individuals in a cohabiting relationship is to get to know themselves very well first, so they know what they have to offer and how to do it, and to do everything in their power to have a harmonious relationship and to be at peace with the decisions made: *“(…) to give and demand respect and understanding, to communicate when and as much as they feel the need, because we know very well how harmful toxic relationships, resentments, or regrets can be. I advise them not to do anything they do not want within a relationship, and if they want to live together, to do so with a peaceful heart, without considering external factors, and if they wish to get married, to do so, because it is their choice.”*

#### **4. Conclusions**

Currently, marriage can be defined as a legal covenant through the union of two people, based on certain essential values such as mutual respect, love, and the desire to build a shared life with the partner. This involves the sharing of new responsibilities that arise in the relationship, resources, and life experiences that partners encounter with this stage, thus introducing the notion of equality in the newly formed family. Marriage can encompass, but is not limited to, cultural, traditional, and religious aspects, being adaptable to reflect both the essential and modern values and needs of couples.

Cohabitation and marriage have a close relationship with each other, as before deciding to get married, today's youth often choose to live together for an extended period, which is the definition of cohabitation. Furthermore, if they do not live together, they will not easily realize what the responsibilities of marriage and family life entail. Cohabitation has become increasingly common among young people today, due to the freedom and flexibility it offers to partners.

Therefore, the present research is based on the study and analysis of the concepts of cohabitation and marriage from the perspective of married young people and their impact on their lives. In this sense, several essential ideas can be extracted from the study, such as:

Regarding the description of the relationship, it is based on certain important values that help maintain the relationship, namely: love, respect, trust, communication, and finally, friendship. The decision to live together occurs when both partners are ready to take this step, with the main goal of completing their professional studies and achieving financial stability.

In terms of time, there is no specific number of months/years; each is free to decide regarding their relationship based on how things progress between them, but most prefer to spend as long as possible getting to know each other better. There have been no significant changes after transitioning from cohabitation to marriage, only a few usual changes such as: changing the last name (in the case of women), wearing a wedding ring (in the case of men).

No differences have appeared after marriage, except for the change in civil status. Young people believe that there are no major differences between cohabitation and marriage if the relationship is based on certain well-defined values.

From the perspective of married individuals, responsibilities have not undergone changes, while from the perspective of those in cohabitation, the change in responsibilities will be noticeable after marriage, especially with the arrival of a child.

Communication is the foundation of both cohabitation and marriage relationships, as if there is honest communication between partners from the onset of even the smallest problems, they will be able to avoid repeating mistakes to maintain a healthy relationship. Regarding the topics of discussion between partners, these include each other's hobbies as well as personal visions regarding family life.

Individuals in a cohabitation relationship do not view marriage as something imposed by tradition, but rather as a union through an act; on the other hand, married individuals consider marriage as a tradition and a maturation of the relationship. Young people prefer cohabitation relationships because it allows them to live together without having legal obligations towards their partner. For a harmonious relationship, mutual respect and communication are essential in any relationship, whether it be cohabitation or marriage.

Marriage remains a personal decision, depending on the values, concerns, and desires of each couple, representing an important step that allows them to have a responsible life.

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# Constructing Aspirational Identity Through Consumption: A Sociological Perspective on Generations X, Y, and Z

**Gabriel Viorel LUPU**

PhD Student, Doctoral School of Sociology, Faculty of Sociology and Social Work,  
University of Bucharest (Romania)  
Email: gabriel.lupu@unibuc.ro

**Abstract:** *This paper explores the formation of aspirational identity through consumption, with a focus on the sociological perspectives of Generations X, Y, and Z. Drawing on theoretical frameworks such as the aspirational class (Currid-Halkett, 2017), the capacity to aspire (Appadurai, 2004: 60), and the possible selves theory (Markus & Nurius, 1986), the study examines how individuals construct their identity not only through economic capital but also through symbolic and cultural consumption. The research is based on a qualitative analysis of existing literature and market studies, identifying key trends that influence aspirational identity formation. Findings suggest that younger generations use consumption as a means of self-expression and social positioning, leveraging digital platforms to align their identities with their aspirations. This study also highlights the role of technological advancements in shaping new consumption patterns and social interactions. The conclusions emphasize the importance of understanding aspirational identity in the context of globalized consumer culture and suggest directions for future research on the intersection of social media, consumer behavior, and identity construction.*

**Keywords:** *aspirational identity; consumer behavior; generational consumption patterns; social mobility; digital consumption*

## 1. Introduction

The main objective of this research is to explore how different generations construct their aspirational identity through consumption. Specifically, the study aims to:

- Identify the key factors that influence the formation of aspirational identity among Generation X, Millennials, and Generation Z.
- Analyze how the socio-economic and technological contexts shape the aspirational identity of each generation.
- Examine how symbolic consumption practices differ between generations and how these practices influence social belonging and self-perception.
- Investigate the role of digitalization and online branding in shaping modern aspirational identities.

By achieving these objectives, the research contributes to the understanding of how consumer behavior and identity construction intersect in contemporary society, offering insights into the socio-cultural dynamics of modern generations.

Social classes represent a fundamental concept in sociology, used to describe and analyse the economic, cultural, and social divisions within a society. The modern concept of social class has its roots in the works of Karl Marx and Max Weber. Marx (1867/1992) argued that class structure is determined by individuals' relationship with the means of production, dividing society into two major groups: the bourgeoisie (those who own capital) and the proletariat (those who sell their labor power) (Marx, 1992). In contrast, Weber (1922/1978) proposed a more complex perspective, arguing that social class is not solely defined by economic factors but also by status (social prestige) and power (control over resources and decision-making processes) (Weber, 1978).

In contemporary sociology, Pierre Bourdieu (1984) expanded the analysis of social classes by introducing the concept of economic, cultural, and social capital. He argued that class membership is determined not only by material resources but also by habitus—a set of internalized dispositions that shape individuals' tastes, behaviors, and choices (Bourdieu, 1984). Additionally, Elizabeth Currid-Halkett (2017) developed the concept of the "aspirational class", asserting that in post-industrial societies, social status is increasingly determined by cultural consumption and investments in education rather than the traditional accumulation of economic capital (Currid-Halkett, 2017).

Thus, the definition of social classes has evolved significantly, encompassing not only economic factors but also cultural, symbolic, and aspirational dimensions, highlighting the complexity of contemporary social hierarchies.

In contemporary society, social class membership is no longer determined exclusively by economic factors but also by personal aspirations and the way individuals project their future identity. Unlike classical theories that describe social classes as rigid structures based on economic capital (Marx, 1992; Weber, 1978), recent research highlights a dynamic process of social identity construction, influenced by consumption, education, and cultural capital (Bourdieu, 1984; Currid-Halkett, 2017). This perspective introduces an aspirational dimension to social class analysis, suggesting that individuals not only reflect their current status but also actively shape their identity based on what they aspire to become.

In this context, the concept of "identity aspirations" becomes essential for understanding how individuals define and project their future selves. Studies show that cultural and social factors play a central role in this process, influencing how people perceive themselves and set life goals. Specifically, the possible selves theory (Markus & Nurius, 1986) suggests that individuals develop their identity not only based on their past and present but also in relation to imagined future versions of themselves. This theory provides an explanatory framework for understanding how individual aspirations influence choices in consumption, education, and career paths, facilitating social mobility.

Another relevant concept is that of the "aspirational class", introduced by Elizabeth Currid-Halkett (2017), which describes a new type of social stratum defined more by aspirations than by material wealth. Unlike traditional upper classes, members of this social class invest in education, cultural capital, and consumption practices that reflect aspirational status rather than visible luxury goods. This shift highlights a transition from rigid economic hierarchies to more fluid social structures, where aspirational identity becomes a key tool for social positioning.

Thus, integrating aspirational identity into social class analysis allows us to explore how individuals construct their identity not only as a reflection of their current position but also as a projection of what they want to become. This phenomenon is particularly visible in the globalized economy, where consumption and education are used as primary strategies for achieving the desired status. Therefore, studying aspirational identity provides an innovative sociological perspective on social mobility and emerging forms of social stratification.

This research aims to identify the sources of inspiration for young people (particularly members of Generation Z) in shaping their aspirational identities by examining their consumption trends. The importance of these trends lies in the fact that they will define the lifestyle adopted by younger generations as they transition into adulthood in the coming years. Moreover, it is crucial to analyse how consumption trends are closely linked to the sectors where significant financial



investments will be made.

Consumption trends indicate the direction of technological progress and highlight industries that will experience growth or decline due to the "creative destruction" process of shifting consumption patterns (Kotler & Keller, 2006). Depending on these trends, certain industries will expand, while others will face obsolescence.

Consumer trends shape the way people interact socially. These trends influence everyday social interactions, reflecting generational differences in content consumption and communication habits. One easily observable example is online content consumption, which varies significantly across generations. Digital natives (Prensky, 2001)—predominantly members of Generation Z (individuals born after 1995)—prefer short, entertaining video content, such as that found on TikTok. Generation Y (individuals born between 1980 and 1994) prefers static online content, including text and images, such as content found on Facebook. Generation X (born between 1965 and 1979) still consumes traditional media, including newspapers, radio, and television (Codruț, 2018). These differences in content consumption shape how people interact socially, leading to distinct social dynamics among the three generations.

Although digital natives and Generation Z are often conflated, they represent distinct sociological concepts. The term "digital native," introduced by Prensky (2001), refers to individuals who grew up in a technology-rich environment and possess an intuitive understanding of digital tools. In contrast, Generation Z is defined demographically, encompassing individuals born approximately between 1995 and 2010, for whom digital technology is an integral part of daily life (Twenge, 2017: 22). While all members of Generation Z can be considered digital natives, not all digital natives belong to Generation Z. For example, Generation Y includes the first digital natives, who adapted early to the internet era. This distinction highlights that digital nativity is more of a competence and interaction mode, while Generation Z represents a demographic category shaped by distinct socio-cultural experiences.

On one hand, material goods serve as indicators of social status and identity markers, including gender perception and cultural affiliations. On the other hand, technological advancements have eroded geographical and temporal barriers in socialization, leaving only linguistic and cultural barriers. Globalization has facilitated access to global markets, allowing individuals to consume virtually anything, while simultaneously enabling them to publicly showcase their consumption choices to others.

Additionally, both physical possessions and consumption habits (cultural, digital, dietary, etc.) shape how individuals perceive others and are perceived by them. In other words, consumption is not just a means of acquiring goods but also a method of constructing both real and aspirational identity. It serves as a mechanism for social positioning, helping individuals to signal their identity and assess the identity of those they interact with.

Based on these considerations, this research aims to analyse the consumer behavior of Generation Z (digital natives). Identifying consumption trends among digital natives will provide valuable insights into how social interactions will evolve in the future and how consumption contributes to identity formation. By understanding how digital natives interact with consumption, we can anticipate future shifts in social behavior and market dynamics, as well as the evolving role of consumption in identity construction.

## **2. Integrating the theory of social aspirations and possible selves into the analysis of aspirational identity**

An essential element in the construction of aspirational identity is the interaction between individual aspirations and the social framework within which they are formed and expressed. Two relevant theories for this discussion are the theory of social aspirations (Appadurai, 2004: 60) and the theory of possible selves (Markus & Nurius, 1986), which offer complementary perspectives on how individuals project their future and structure their identity.

Arjun Appadurai (2004) introduces the concept of "The Capacity to Aspire", arguing that aspirations are not merely individual desires, but rather social structures influenced by individuals' cultural, economic, and symbolic capital. According to this perspective, individuals from different social classes do not have equal access to aspirations, as the capacity to envision a better future is shaped by the resources and opportunities available. More specifically:

- Aspirations are socially constructed, not merely personal choices.
- The ability to aspire is distributed unequally across social classes, reflecting economic and cultural disparities.
- Those who possess greater cultural and economic capital have a broader capacity to aspire, allowing them to envision and pursue a wider range of possibilities.

This theory highlights the social stratification of aspirations, illustrating how systemic inequalities shape individuals' ability to dream and achieve. By understanding the social determinants of aspirations, we can gain insights into the formation of aspirational identities and their role in social mobility.

The possible selves theory developed by Markus and Nurius (1986) examines how individuals define their identity not only based on their past and present experiences but also on their imagined future self. This theory posits that people construct their identity according to two types of possible selves:

- Desired self (Aspirational) – How they imagine they could become (e.g., a successful person, a respected leader, a sophisticated consumer).
- Feared self – How they imagine they might fail (e.g., poverty, lack of social recognition, marginalization).

This theory is fundamental to aspirational identity as it explains why individuals invest in consumption as a way to move closer to their desired self. Products, services, and lifestyles are chosen not merely for their utilitarian value, but for their ability to build and validate a desirable identity.

By purchasing goods and engaging in activities that symbolize success, sophistication, or social recognition, individuals can reinforce their aspirational identity while distancing themselves from their feared self. Thus, consumption becomes a strategic tool for identity construction, allowing individuals to navigate the complex interplay between aspirations and fears.

Examples of aspirational identity construction through consumption:

- A young person from a modest social background who aspires to a higher status may invest in education and products that symbolize success (e.g., branded clothing, premium gadgets).
- A professional in a competitive field may use consumption as a tool for differentiation, adopting lifestyles associated with the desired status (e.g., premium gym memberships, participation in exclusive events).

In essence, the synergy between social aspirations and possible selves reveals aspirational identities. By integrating these two theories, we can gain a deeper understanding of how individuals construct their aspirational identity through

consumption.

The theory of social aspirations (Appadurai, 2004: 60) explains the inequalities in access to aspirations, emphasizing that social status influences individuals' ability to dream of a better future. This theory highlights how cultural, economic, and symbolic capital affect the capacity to aspire, with privileged social classes having greater access to aspirational resources.

On the other hand, the possible selves theory (Markus & Nurius, 1986) explains the psychological mechanism through which individuals shape their identity, choosing behaviors and products that bring them closer to their desired self-image.

Therefore, consumption is not merely an economic act, but a complex identity process, acting as a bridge between social aspirations and individual identity. This perspective opens up new research directions in sociology, highlighting the significance of symbolic mobility in contemporary societies.

By examining how individuals navigate the tension between aspirations and reality, we can better understand the social dynamics underlying identity formation and the role of consumption in articulating social belonging and personal success.

### **3. Methodological considerations**

For this study, I chose to focus on the three main consumer-active generations (Generations X, Y, and Z), with particular emphasis on individuals from Generation Z. Although the proportion of Baby Boomers in the total population of Romania remains high, I have chosen not to delve deeply into the characteristics of this generation. This decision is based on the fact that Baby Boomers are nearing retirement age or are already retired, and as a result, their incomes are significantly lower compared to individuals from Generations X, Y, or Z. Lower incomes imply greater consumption restrictions. According to a report from the National Institute of Statistics in 2019, the average net salary in Romania was 3,168 lei (763 USD) (INS, 2021).

A World Bank report from 2019 noted that the labor force participation rate among workers nearing retirement age in Romania (ages 55–64) was 41.4%, slightly below the EU average of 45.5%. The report also highlighted that older workers in Romania tend to have lower incomes and lower educational levels compared to younger workers (World Bank, 2019).

Additionally, a survey conducted by the National Association of Pensioners in Romania (2018) found that the average monthly pension was 1,233 lei (approximately 297 USD), which is significantly below the national average salary (ANPR, 2018).

In general, while specific data on Baby Boomer income in Romania is limited, it is likely that many of them have lower incomes compared to younger generations, relying on pensions or social assistance programs to supplement their retirement income.

Apart from income, there are other factors that can influence an individual's consumption habits or even the consumption patterns of an entire generation. In sociology, consumption refers to the process of acquiring and utilizing goods and services to meet individual and societal needs (Miles, 1998). It is not merely a utilitarian activity, but also a cultural and social practice shaped by various factors such as class, gender, ethnicity, and lifestyle (Warde, 2016). Additionally, consumption can be defined as "the process by which people acquire, use, and dispose of goods and services" (Hetherington, 2009). This includes not only the material aspects of consumption, such as purchasing and using products, but also the symbolic

meanings and social practices associated with them.

In sociology, identity refers to how individuals and groups define and understand themselves in relation to others and their social environment (Jenkins, 2008). It encompasses various dimensions, such as race, gender, class, sexuality, and nationality, and it is shaped by social interactions, institutions, and cultural norms (Bourdieu, 1986). Identity is not a fixed and stable concept but rather a dynamic and continuous process, shaped by factors such as socialization, culture, and power relations (Burke & Stets, 2009).

There is a significant relationship between identity and consumption, as individuals use consumption as a means of expressing and constructing their identities (Thompson, 1996). Consumption patterns, such as the types of goods and services purchased by individuals, can reflect social status, cultural preferences and lifestyle choices (Featherstone, 1991: 58). At the same time, consumption practices can influence and shape both individual and collective identities by reinforcing cultural norms and social hierarchies (Holt, 1997).

In contemporary societies, consumption increasingly becomes a means by which individuals express and construct their identities. People use the products they consume to signal social status, cultural preferences and lifestyle choices. For instance, the type of car one drives, the brand of clothing one wears, and the restaurants one frequents are all forms of consumption that can reflect an individual's identity.

At the same time, consumption practices can influence and shape both individual and collective identities. Cultural norms and social hierarchies are reinforced through consumption practices. For example, the association of luxury goods with social status and gender marketing of products help reinforce traditional gender roles. These practices can have both positive and negative effects on identities. On the one hand, consumption can provide a sense of belonging and self-expression, while on the other hand, it can create social exclusion and reinforce inequality.

The relationship between identity and consumption is a central theme in contemporary sociology, as researchers explore the ways in which consumption practices intertwine with the construction and expression of individual and collective identities (Holt, 1997; Thompson, 1996).

According to Holt (1997), consumption practices are an essential means through which individuals construct and communicate their identity to others. Consumers use the products they buy to signal social status, cultural preferences and lifestyle choices. This can be observed in how individuals choose to dress, the types of food they consume and the leisure activities they engage in.

Similarly, Thompson (1996) explores the gender aspects of consumption, highlighting how women, in particular, use consumption as a means of identity construction. She argues that women's consumption practices are shaped by the conflicting demands of caregiving and self-expression.

However, while consumption practices can reflect and shape individual identities, they are also shaped by broader cultural and social norms. As Featherstone (1991) notes, consumption of goods and services is a cultural practice embedded in social relations and it can reinforce social hierarchies and inequalities. For example, the association of luxury goods with social status can create a sense of exclusivity and consolidate class distinctions.

In conclusion, the relationship between identity and consumption is complex and multifaceted. Consumption practices both reflect and shape individual and collective identities in various ways. Understanding this relationship is crucial for

scholars who seek to analyse the cultural and social dimensions of contemporary societies.

As Holt (1997) points out, consumption practices serve as important tools for individuals to construct and communicate their identity to others. Similarly, Thompson (1996) highlights the role of consumption in gender identity construction, while Featherstone (1991) emphasizes that consumption is embedded in social relations and hierarchies.

By examining how consumption patterns influence identity construction, sociologists can gain a deeper understanding of how cultural norms and social inequalities are maintained and reproduced in modern society.

#### **4. Exploring aspirational identity through consumption: a comparative analysis between generations**

The characteristics of each generation reveal different ways of constructing aspirational identities. Aspirational identity is strongly influenced by the socio-economic, technological and cultural context in which a generation develops. Each generation has been exposed to different realities, shaping how individuals define success, set aspirations, and choose the means to achieve them. The key factors determining these differences include economic structures, access to technology, media influence, and prevailing social values.

##### **4.1. Baby Boomers (1946–1964) – aspirations based on stability and economic success**

The Baby Boomers generation emerged during a period of economic expansion and post-war prosperity, leading to a perception of success grounded in financial stability, hard work and the accumulation of economic capital (Twenge, 2017: 22). This generation was heavily influenced by industrial capitalism values and the promise of social mobility through hard work and loyalty to employers (Holt, 2004: 125).

Aspirational identity: Based on stable careers, home ownership, and traditional family structures.

Validation methods: Professional advancement, savings, purchasing a home, and securing a pension.

Consumption as a symbol of success: Premium cars, large houses, investments in durable goods.

According to Veblen's theory of conspicuous consumption (1899), social status for Baby Boomers was consolidated through the accumulation of visible goods, such as large homes and luxury automobiles. Additionally, as Bourdieu (1984) argued, this generation focused primarily on economic capital rather than cultural or social capital.

##### **4.2. Generation X (1965–1980) – flexibility and redefinition of success**

Generation X grew up during periods of economic recessions, energy crises, and major shifts in family structures. As the first generation to experience labor market instability, they developed a more pragmatic perspective on success (Strauss & Howe, 1991).

Aspirational identity: Emphasizing a balance between career and personal life, with an individualized notion of success.

Validation methods: Economic independence, autonomy, innovation, and entrepreneurship.

Consumption as a symbol of aspiration: Unique experiences (travel, adventures), technological gadgets, and alternative culture.

In line with Bourdieu's concept of cultural capital (1984), Generation X began to value education and personal development more than the mere accumulation of material goods. Additionally, this generation witnessed the emergence of mass-market technology brands, which became symbols of independence and social aspirations (Featherstone, 1991: 58).

#### **4.3. Millennials (1981–1996) – aspirational identity through experiences and personal branding**

Millennials represent the first generation raised in the digital era, fundamentally transforming how they construct their aspirational identity. Unlike previous generations, Millennials place a high value on authenticity, personal development, and social impact rather than material ownership (Prensky, 2001).

Aspirational identity: Centered on personal branding, activism, and sustainability.

Validation methods: Online presence, social influence, vocational careers, and activism.

Consumption as a symbol of aspiration: Travel experiences, eco-friendly products, and personal branding through social media.

According to the possible selves theory (Markus & Nurius, 1986), Millennials project their aspirational identity through consumption choices, with social media playing a crucial role in social validation of these choices.

#### **4.4. Generation Z (1997–2012) – fluid, digitalized, and hyperconnected aspirational identity**

Generation Z is digitally native, meaning that the process of constructing an aspirational identity is entirely dependent on technology and social media (Twenge, 2017: 22). This generation highly values online communities, viral content, and personalized consumption experiences.

Aspirational identity: Built on creativity, innovation, and redefining social norms.

Validation methods: Online communities, viral content, building a digital personal brand.

Consumption as a symbol of aspiration: NFTs, digital fashion, augmented reality, and personalized products.

Recent studies indicate that digital influencers have a substantial impact on Generation Z's consumption decisions (Helmi et al., 2024). This generation is the first to leverage consumption not just as a means of self-expression but as a way to gain social and economic capital through digital platforms.

The differences between Baby Boomers, Generation X, Millennials, and Generation Z highlight that aspirational identity is not a static construct, but a dynamic process shaped by economic, technological, and cultural factors. While Baby Boomers and Generation X perceived success as the outcome of hard work and financial stability, Millennials and Generation Z have redefined aspirational identities through symbolic consumption, digitalization, and personal expression.

According to the theory of the "aspirational class" (Currid-Halkett, 2017), consumption has transformed from being merely an indicator of economic status to becoming a means of identity affirmation, particularly among younger generations.

While Baby Boomers and Generation X validated their identities through material acquisitions and economic capital accumulation, Millennials and Generation Z prioritize experiences, personalization, and digital connectivity (Featherstone, 1991; Twenge, 2017). This shift underscores the transition from ownership-based consumption to one focused on experience and social belonging. Moreover, the

influence of social networks and the digital economy has turned aspirational identity into a fluid and interactive process, where individuals constantly adapt their aspirations according to global trends and online community validation (Helmi et al., 2024).

The generational analysis demonstrates that aspirational identity is influenced by technological and cultural transformations, with consumption remaining a core element in this process. This dynamic calls for a continuous reassessment of consumption and marketing strategies, as well as future studies on how emerging generations will redefine aspirational identity within the context of accelerating technological evolution.

## **5. Research methodology and sources used**

This research is of a theoretical-analytical nature and is based on the analysis of existing literature and market studies on consumption trends. Through a qualitative approach, the article explores how aspirational identity is constructed through consumption, utilizing relevant secondary sources from sociology, social psychology, and marketing. Additionally, recent theories regarding the Baby Boomers, Generation X, Millennials, and Generation Z were included, emphasizing how aspirational identity evolves depending on social and technological context.

### **5.1. Analyzed sources**

The analysis was based on the following types of sources:

- Scientific literature on identity, consumption, and social classes (e.g., Bourdieu, Appadurai, Markus & Nurius, Currid-Halkett, Strauss & Howe, Twenge).
- Studies on consumption behaviors and the identity dynamics of Baby Boomers, Generation X, Millennials, and Generation Z (e.g., Holt, Featherstone, Prensky, Helmi et al.).
- Market studies on consumption preferences and the influence of technology on the formation of aspirational identity.
- Economic and sociological reports on global consumption trends, changes in social interaction models, and the impact of digitalization on consumption choices.

### **5.2. Source selection criteria**

To ensure the relevance and validity of the analysis, the sources were selected based on the following criteria:

- Recognized academic publications (articles from journals indexed in databases such as Scopus, Web of Science, ResearchGate).
- Recent studies (especially from the last 10-15 years) to capture the current dynamics of consumption and emerging cultural influences.
- Market reports and sociological studies with empirical data on the consumption preferences of Baby Boomers, Generation X, Millennials, and Generation Z.
- Reference works on consumer culture and aspirational identity theories (e.g., Featherstone, Holt, Currid-Halkett, Appadurai).

### **5.3. Analysis method**

The methodological approach of this research is theoretical-analytical, drawing on existing literature and market studies related to consumption trends and generational differences. A qualitative approach was chosen to capture the complex nature of aspirational identity construction through consumption.

The study applies a comparative generational analysis, examining how Baby Boomers, Generation X, Millennials, and Generation Z construct their aspirational identity through different consumption patterns. The analysis integrates various

sociological theories such as:

Social aspirations theory (Appadurai, 2004: 60): To understand how cultural and economic factors shape aspirations.

Possible selves theory (Markus & Nurius, 1986): To analyze how individuals project their future identity through consumption.

Aspirational class theory (Currid-Halkett, 2017): To explore how consumption practices reflect social stratification.

Postmodern consumption theory (Featherstone, 1991: 58): To contextualize how symbolic consumption shape's identity.

This approach enabled the identification of the key socio-cultural and economic differences between generations and how each group leverages consumption as a means of identity validation and social positioning.

## **6. Conclusions**

This research has highlighted the fundamental role of consumption as an instrument of identity validation and aspirational identity construction, shaped according to the characteristics of each generation. While for Baby Boomers, consumption was primarily an outcome of financial success, for Millennials and Generation Z, it has become an active means of self-definition and social belonging.

Aspirational identity is not a fixed construct, but a dynamic process that evolves as economic, social, and technological factors change. Younger generations live in an era of hyperconnectivity, where personal branding and online validation play a central role in defining success and individual aspirations.

### **6.1. Generations and the transformation of aspirational consumption**

The findings of this research indicate that aspirational identity is not merely a reflection of socio-economic status, but a complex construct shaped by the interplay of economic stability, technological advancements, and social mobility aspirations. The comparative analysis reveals that while Baby Boomers and Generation X have associated aspirational identity primarily with economic security and stability, Millennials and Generation Z focus on experiential consumption, social visibility, and personal branding.

In contemporary society, aspirational identity acts as a dynamic marker of social belonging, heavily influenced by globalization and digital interconnectedness. The transition from ownership-based consumption to experience-based consumption underscores the importance of personal branding and symbolic capital in defining success.

This research highlights the need for continuous reassessment of marketing strategies and social policies to adapt to the evolving nature of identity construction. Furthermore, as technology continues to redefine social interactions, future studies should investigate how emerging generations (such as Generation Alpha) will shape and redefine aspirational identity in increasingly digitalized environments.

Baby Boomers were anchored in a stable economy, where aspirational identity was associated with property ownership and financial security. The model of conspicuous consumption (Veblen, 1899) dominated, and the accumulation of economic capital was the primary symbol of success.

Generation X witnessed a significant economic transition and valued autonomy and flexibility more than economic stability. This generation began to see consumption as an expression of lifestyle and individuality, paving the way for major transformations in the consumption models of subsequent generations.



Millennials completely reconfigured the relationship between consumption and aspirational identity, emphasizing authenticity, sustainability, and experiences. Personal branding became a key mechanism of social validation, and social networks started to shape perceptions of success and social aspirations.

Generation Z takes this process to another level, transforming consumption into a fluid and digitalized tool. This is the first generation where symbolic and social capital (Bourdieu, 1984) have a greater influence than economic capital in the identity construction process.

### **6.2. Determinant factors in shaping aspirational identity through consumption**

The research findings confirm that aspirational identity is influenced by a combination of factors, with the importance of each factor varying by generation:

- Economic factors: While Baby Boomers and Generation X were motivated by financial security and professional progress, Millennials and Generation Z adopted a consumption model based on experiences and personal branding.
- Cultural and social factors: Consumption acts as a mechanism of social positioning, with recent generations valuing inclusivity, sustainability, and diversity.
- Technological factors: Digitalization and the gig economy have enabled the emergence of multiple and fluid identities, where success is no longer defined by material accumulation but by online visibility and social interactions.

This research demonstrates that aspirational identity is closely linked to consumption, but it manifests differently depending on the generation. While consumption was once a symbol of economic success, it has now become a means of self-expression and social validation, with increasing influence from technology and globalization.

In the future, aspirational identity is expected to become even more flexible and interconnected with the digital environment, reshaping how individuals relate to success, belonging, and social status.

### **7. Study limitations**

This research did not include primary data collection, meaning that the interpretations rely exclusively on the analysis of existing literature. Additionally, the phenomenon of aspirational consumption is constantly evolving, making it essential to continuously update studies in this field.

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# Bureaucracy and Its Functional Deviations: From Max Weber to the Critique of Biopathology

**Adrian OTOVESCU**

Professor PhD, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: adiotovescu@yahoo.com

**Răzvan NEACȘU**

PhD Student, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: razvang.neacsu@gmail.com

**Abstract:** *This article examines the theoretical foundations, paradigmatic developments, and critical reorientations that have shaped sociological inquiry from its classical emergence to its contemporary dispersions. Rejecting both teleological narratives of progress and reductionist categorizations, the text proposes a layered and reflexive reading of theory as a space of epistemic contestation. Through a systematic engagement with canonical authors such as Durkheim, Weber, and Mills, alongside interventions by Kuhn, Foucault, Bourdieu, and contemporary scholars of digital, intersectional, and posthumanist sociology, the article reconstructs the shifting modalities of explanation, from functionalist systematization to genealogical critique and assemblage-based analysis. Rather than treating theory as a reservoir of fixed models, it is approached as a field of conceptual labor, where meanings are constructed, interrogated, and reframed. In place of synthesis or closure, the study emphasizes the cartographic orientation of contemporary theorizing, wherein categories are unsettled, boundaries are porous, and knowledge emerges through translation, resonance, and rupture. The contribution invites renewed attention to the conditions under which sociological concepts are produced and to the tensions that animate their deployment in historically situated configurations.*

**Keywords:** *sociological theory; conceptual foundations; paradigmatic critique; epistemic pluralism; contemporary sociological thought.*

## 1. Introduction

The endeavor to delineate the contours of sociological inquiry involves a sustained engagement with the epistemological foundations that have historically underpinned the discipline. This engagement presupposes not only a familiarity with the classical heritage of sociological thought, but also a continuous interrogation of the conceptual apparatus through which social phenomena are apprehended, interpreted, and situationally recontextualized. In this sense, sociological theory does not merely offer a descriptive lexicon for the world of the social, but constitutes itself as a critical apparatus of interpretation, one that both reflects and interrogates the transformations of the social world it seeks to understand.

In his methodological treatise, *The Rules of Sociological Method*, Émile Durkheim (1966) establishes a decisive epistemic boundary between sociology and adjacent disciplines by articulating the category of the "social fact" as a *sui generis* reality. According to Durkheim, social facts are ways of acting, thinking, and feeling that exist outside the individual consciousness yet exert coercive power upon it. This coercion, though impersonal, generates norms, institutions, and collective sentiments that stabilize the social order. Durkheim's perspective presupposes an ontological dualism: the individual, as bearer of psychological traits, and society, as repository of supra-individual regularities. From this vantage point, sociology is summoned to treat these facts "as things," that is, with the detachment and systematicity appropriate to the natural sciences,

but with the interpretive vigilance suited to the social field.

However, the stability of these epistemic frameworks becomes less assured when placed under the scrutiny of a philosophy of science that problematizes the idea of cumulative progress. Thomas Kuhn (2012), in his influential study on scientific revolutions, introduces the concept of paradigm as a constellation of beliefs, values, and techniques shared by a scientific community. In this account, paradigmatic stability is periodically interrupted by crises that culminate in revolutionary shifts, each entailing the replacement of one mode of scientific rationality by another. When transposed to the field of sociology, Kuhn's schema illuminates the profound transformations in the conceptual grammars through which social reality has been understood—from positivist determinism to structuralism, and from interpretive models to post-structuralist critiques. This historicity of thought, far from representing a mere background, becomes an intrinsic dimension of sociological theorization.

C. Wright Mills (1959) brings into focus a distinct methodological imperative: the task of connecting private troubles to public issues, individual biographies to historical structures. The sociological imagination, as he defines it, functions not simply as an intellectual capacity, but as a mode of consciousness capable of discerning the interdependence between subjective experience and structural determinants. What emerges from this formulation is a demand that the sociologist resist both psychological reductionism and abstract structuralism, cultivating instead a reflexive posture that traverses the boundaries between personal narratives and institutional configurations. In Mills' conception, sociology is not a science of general laws, but a vocation of interpretation oriented toward historically situated meaning.

Max Weber (2001), in his exploration of the Protestant ethic and its unintended consequences for the emergence of capitalist rationality, offers another theoretical configuration in which subjectivity occupies a central position. Unlike Durkheim, who foregrounds external constraint, Weber is concerned with the internalization of values, particularly the role of asceticism and vocation in shaping conduct. The rationalization of life, as framed by Protestant ethics, leads paradoxically to the formation of impersonal economic institutions that, once established, transcend their cultural origins. In Weber's analysis, meaning is not imposed from above, but generated through the actor's orientation to value. His interpretive sociology (*Verstehende Soziologie*) reorients the discipline from causal explanation to hermeneutic reconstruction, calling for a methodology attentive to both historical context and subjective intentionality.

The convergence and divergence of these theoretical positions underscore the plurality of perspectives from which the social world can be apprehended. Rather than cohering into a unified theoretical edifice, sociology appears as a discursive field constituted by epistemic tensions, methodological alternatives, and interpretive pluralism. This discursive condition does not undermine the discipline's scientific aspirations, but signals a reflexive commitment to the self-critical interrogation of its own foundations.

## **2. Conceptual Genesis and the Evolution of the Theme in Sociological Thought**

The emergence of sociological theory as a distinct mode of intellectual inquiry did not follow a predetermined trajectory, nor did it arise in a conceptual vacuum, but rather out of the confluence of philosophical traditions, moral doctrines, and empirical investigations that gradually began to delineate the contours of what would later be designated as the scientific study of society. In this sense, the conceptual genesis of sociology cannot be reduced to a single foundational moment or author, since its early articulation was marked by a diversity of perspectives, each attempting to circumscribe

the domain of the social in relation to the natural world, to individual consciousness, and to normative systems of value.

The foundational contribution of Émile Durkheim, particularly in his treatise *Les règles de la méthode sociologique*, published at the close of the nineteenth century, may be regarded as a pivotal attempt to impose methodological rigor upon an emerging field that had yet to define its object with clarity and consistency. Durkheim (1982) introduces the concept of “social facts,” defined as manners of acting, thinking, and feeling that exist outside individual consciousness and exert a constraining influence upon it. These facts, he insists, must be treated “as things”, that is, as objective realities amenable to empirical investigation and conceptual delimitation. This methodological posture reflects Durkheim’s broader effort to demarcate sociology from both psychology, which he perceived as overly focused on the individual psyche, and from philosophy, which tended to rely on speculative reasoning rather than on observation. By positing that society generates its own sui generis realities, irreducible to the sum of individual acts, Durkheim introduces a metaphysical assumption about the emergent properties of collective life, one that would prove enduring within structural-functionalist paradigms of the twentieth century.

While Durkheim’s conceptualization foregrounds the exteriority and constraint of the social, Max Weber, writing in the early decades of the twentieth century, advances a distinct paradigm rooted in interpretive understanding. In *Die protestantische Ethik und der Geist des Kapitalismus*, Weber (2002) investigates the cultural and religious origins of modern rational capitalism, arguing that specific theological orientations—most notably the Calvinist doctrine of predestination—contributed to the formation of a psychological ethos characterized by ascetic labor, methodical conduct, and a rationalized orientation toward economic activity. Weber does not attribute causal efficacy to religious doctrine alone but insists on the meaningful action of individuals who, guided by values and beliefs, structure their lives according to a rational calculus of ethical consistency. The concept of *Verstehen*, or interpretive understanding, becomes central in Weber’s epistemology, as he maintains that sociological explanation must attend not only to causal regularities but also to the subjective meanings individuals attach to their actions. In contrast to Durkheim’s “things,” Weberian sociology privileges intentionality and symbolic mediation, positioning the actor, rather than the structure, as the primary unit of analysis.

The divergence between these two traditions—objectivist and interpretivist—has continued to inform theoretical debates across the sociological canon. Yet both perspectives emerged within broader intellectual contexts marked by assumptions about the unity of scientific reason, a notion that would later be subject to radical critique. The epistemological challenge to cumulative scientific progress finds one of its most influential formulations in Thomas Kuhn’s *The Structure of Scientific Revolutions*, in which the concept of paradigm becomes central to understanding the discontinuous and non-linear evolution of scientific knowledge. Kuhn (2012) contends that scientific communities operate within paradigms—shared frameworks of assumptions, exemplars, and methodological commitments—that shape both the questions asked and the answers deemed acceptable. Paradigm shifts, or scientific revolutions, occur not as incremental developments but as ruptures, whereby one constellation of understanding is displaced by another. Applied to the development of sociological theory, Kuhn’s model allows for the historicization of conceptual formations, revealing that sociological categories and explanations do not exist outside of historical contingency but are themselves subject to shifts in interpretive frameworks, institutional legitimacies, and political contexts.

The mid-twentieth-century interventions of C. Wright Mills further expand the theoretical horizon of sociology by foregrounding the relationship between biography and

history, between individual experience and structural context. In *The Sociological Imagination*, Mills (1959) articulates a vision of sociology not as a detached science of abstract laws, but as a critical intellectual practice capable of connecting personal troubles to public issues. Mills criticizes both grand theory, which he sees as disconnected from empirical reality, and abstracted empiricism, which he regards as devoid of theoretical substance. The sociological imagination, in his formulation, is the capacity to understand how individual destinies are shaped by the intersecting forces of social institutions, historical dynamics, and collective ideologies. Although his language differs from that of Weber or Durkheim, Mills shares with both an emphasis on the inseparability of individual and collective, of subjective orientation and structural determination.

These diverse contributions do not converge into a singular theoretical edifice, nor do they imply a cumulative development of sociological thought. Rather, they point toward the heterogeneous and contested nature of sociological theorization, a condition that invites continuous reflection upon the very categories and assumptions that guide inquiry. Whether through Durkheim's insistence on the autonomy of the social, Weber's interpretive reconstruction of meaning, Kuhn's historicization of scientific rationality, or Mills's dialectical understanding of structure and agency, the evolution of sociological thought bears the mark of an intellectual tradition that defines itself not through consensus, but through a permanent interrogation of its conceptual foundations.

### **3. Explanatory Models and Paradigmatic Positions**

The proliferation of explanatory models within sociological theory reflects not a cumulative refinement of scientific objectivity, but rather the coexistence of divergent ontological and epistemological assumptions regarding the nature of social reality, the status of agency, and the mechanisms through which regularities emerge in collective life. These models, far from forming a unified theoretical paradigm, often articulate incompatible perspectives on causation, interpretation, and structure. They do not merely compete for explanatory dominance but operate within distinct intellectual traditions, institutional matrices, and methodological allegiances, each striving to impose coherence upon the multiplicity of social processes and configurations.

Among the most enduring oppositions in sociological modeling is the tension between determinist frameworks, which posit the precedence of structure over action, and interactionist or constructivist approaches, which emphasize the generative capacity of agency within negotiated symbolic orders. Structural functionalism, exemplified by the works of Talcott Parsons, elaborates a systemic vision of society as an organized ensemble of interdependent parts whose coherence depends on normative integration and value consensus. In *The Social System*, Parsons (1951) constructs an analytical model in which action is governed by a cybernetic hierarchy of control mechanisms, ranging from cultural norms to personality systems, with institutions serving as the mediating structures that maintain social order. The model presupposes a tendency toward equilibrium and self-regulation, thereby privileging stability and functional necessity in the analysis of social reproduction.

This formalism is countered by the symbolic interactionist tradition, rooted in the pragmatist philosophy of George Herbert Mead and further developed by Herbert Blumer. Rejecting the notion that action derives from fixed normative systems, Blumer (1969) posits that social action arises from interpretive processes in which actors define and redefine meanings through interaction. The model he proposes refuses structural causality in favor of micro-level interpretive sequences that generate shared meanings through symbol-mediated encounters. Such an approach, though sometimes criticized for its lack of macro-level explanatory power, underscores the reflexivity of action and the

fluidity of meaning within everyday life.

The divergence between these models is further intensified by the emergence of structuralist and post-structuralist positions, which, though differing in many respects, share a suspicion toward voluntaristic accounts of agency. The structuralism of Claude Lévi-Strauss, influenced by Saussurean linguistics, views culture as a system of underlying binary oppositions that operate unconsciously, shaping myth, kinship, and symbolic codes without requiring actor intentionality. Though not a sociologist in the strict sense, Lévi-Strauss's influence reverberates in later structuralist sociology, particularly in the works of Pierre Bourdieu. In *Outline of a Theory of Practice*, Bourdieu (1977) introduces the concept of *habitus*—a system of durable dispositions generated by one's position within social space—that mediates between structure and agency. Unlike Parsons's normative voluntarism or Blumer's symbolic interactionism, Bourdieu's explanatory model posits a dialectical relationship between field (as structured space of positions) and habitus (as embodied structure), producing practices that reproduce or transform social hierarchies. The paradigm does not rest on deterministic causality, nor on free choice, but on the misrecognition of structural constraints as natural inclinations.

The explanatory ambitions of these models vary not only in scale and orientation but also in the degree to which they account for historical transformation. This issue is central to the neo-Marxist tradition, where models of explanation derive from a materialist conception of history and a critique of ideological naturalization. In *The German Ideology*, Marx and Engels (1970) propose that the ruling ideas of any age are the ideas of the ruling class, thus implying that explanation must begin with the material conditions of production and the relations of class struggle that define a given mode of production. Later theorists, such as Louis Althusser, introduce a more complex notion of structural causality, whereby economic determination operates “in the last instance,” yet is mediated through ideological and institutional apparatuses. Althusser's structural Marxism eschews both economistic reductionism and humanist voluntarism, offering instead a model in which social formations are overdetermined by a multiplicity of intersecting structures whose effects are not immediately transparent.

These paradigmatic configurations resist synthesis not merely due to their conceptual incompatibilities, but also because each is situated within a broader metatheoretical framework that delineates what counts as an adequate explanation, what ontological assumptions can be sustained, and what methodological procedures are considered legitimate. Whether privileging equilibrium or contradiction, meaning or structure, micro-interaction or macro-constraint, these models construct divergent accounts of social life, each claiming explanatory authority in accordance with its own internal logic and historical lineage.

#### **4. Critical Analysis and Contemporary Developments**

The contemporary condition of sociological theorizing can no longer be reconstituted by appealing to coherent paradigms that aspire to stabilize unitary explanatory models or to maintain a universalist conception of the social. Rather, the landscape of sociological knowledge is now marked by a proliferation of partial perspectives, situated epistemologies, and fragmentary conceptual frameworks that often intersect in unexpected ways, without necessarily converging toward a single theoretical logic. This diversification of theoretical positions, far from implying a collapse of explanation or a retreat into relativism, opens the space for a renewed engagement with the question of how knowledge is produced, under what conditions, and with what political and ontological stakes.

One of the most influential lines of critique directed at the classical sociological canon originates in the reflexive turn, whereby sociological categories themselves are subjected to scrutiny not only as analytical tools but also as cultural products embedded within historical configurations of power and knowledge. Michel Foucault's genealogical method exemplifies this transformation in intellectual posture. In *Discipline and Punish*, Foucault (1977) dismantles the liberal narrative of penal evolution and replaces it with an analysis of the diffuse mechanisms of discipline, regulation, and surveillance that shape bodies and subjects without requiring centralized coercion. In doing so, he not only interrogates the epistemic foundations of institutions but also challenges the assumption that knowledge and emancipation are necessarily aligned. The implications for sociology are substantial, since they force the theorist to reflect on the positionality of analysis and the productive effects of theory itself in constituting the social world it purports to describe.

Concomitantly, Pierre Bourdieu's structural constructivism has inspired critical reconfigurations of how habitus, field, and capital operate under conditions of late modernity. While Bourdieu's original framework focuses on the reproduction of domination through misrecognition and embodied dispositions, recent reinterpretations have sought to adapt his categories to account for the increasing fluidity of social trajectories, the erosion of stable fields, and the transformation of symbolic capital in digital and globalized environments. For instance, Wacquant's (2008) deployment of Bourdieu's theory in the analysis of urban marginality in the post-Fordist city introduces new configurations of exclusion and penal regulation, demonstrating how neoliberalism rearticulates the boundaries between the social and the punitive. These developments do not merely apply existing models to new data but enact theoretical mutations that transform the very architecture of explanation.

The expansion of intersectional analysis, originating from Black feminist thought and queer critique, represents another decisive contribution to the contemporary renewal of sociological theorization. Patricia Hill Collins (2000) elaborates a standpoint epistemology that challenges both positivist neutrality and poststructuralist indeterminacy by situating knowledge within lived experience and collective memory. Her framework, which foregrounds the interlocking systems of race, gender, class, and sexuality, reveals the limits of single-axis analysis and exposes the exclusions encoded in the universal subject of classical sociology. In this context, explanation becomes not an abstract mapping of variables, but an engaged practice of articulation, oriented toward the visibility of marginal positions and the deconstruction of hegemonic representations.

The development of digital sociology further alters the parameters of explanation, not only by introducing new empirical domains but by compelling a reevaluation of sociological temporality, spatiality, and materiality. Deborah Lupton (2015) identifies the entanglement between digital infrastructures and the self, where identity, affect, and surveillance merge into hybrid forms of datafied subjectivity. The analytic challenge no longer lies merely in the interpretation of symbolic interactions or institutional logics, but in deciphering the algorithmic architectures that mediate and modulate behavior in real time. These transformations render obsolete the traditional separation between micro and macro levels of analysis and necessitate a rethinking of causality, agency, and control in terms that account for the ambient governance exercised through platforms, sensors, and predictive analytics.

Posthumanist sociology, in its various articulations, advances this line of critique by dislocating the anthropocentric premises of classical theory. Rosi Braidotti (2013) proposes a conception of subjectivity that emerges from the entanglement of human, technological, and ecological elements, destabilizing the ontological primacy of the



rational actor and inviting a reconsideration of agency as distributed across networks, bodies, and matter. From this perspective, explanation cannot proceed by isolating intentionality or by mapping institutional structures alone; it must trace assemblages, affective flows, and non-human actants that co-produce the social in unpredictable configurations.

Finally, critical realism, as developed by Roy Bhaskar (1979), offers a meta-theoretical alternative to both positivist empiricism and relativist constructivism. By positing a stratified ontology in which generative mechanisms operate beneath the level of empirical observation, critical realism opens the possibility for explanation that neither reduces phenomena to surface appearances nor denies the existence of causal regularities. This framework has found resonance among contemporary sociologists seeking to integrate interpretive sensitivity with analytical depth, particularly in domains such as health, climate, and inequality, where causal complexity defies linear modeling.

Taken together, these contemporary reorientations in sociological thought signal a displacement of theory from the search for general laws to the construction of situated intelligibilities, historically reflexive accounts, and epistemologically plural frameworks. Rather than organizing knowledge under a single logic of explanation, contemporary sociology increasingly operates through transversal articulations, experimental syntheses, and critical interruptions that refuse the closure of theoretical discourse. This condition, though often described in terms of fragmentation or theoretical fatigue, may instead be interpreted as an invitation to reimagine the vocation of theory not as mastery, but as encounter—between disciplines, perspectives, and worlds.

## 5. Conclusions

Theoretical engagement within sociology, when pursued beyond the confines of doctrinal repetition or schematic summarization, reveals not a closed architecture of concepts but an open field in which positions are constantly reconfigured through confrontation, dislocation, and rearticulation. The movements traced across the preceding sections—ranging from the early codifications of sociological method to the contemporary dispersions of explanatory ambition—do not outline a linear trajectory or a cumulative logic. Rather, they enact a mode of conceptual labor through which sociology continues to interrogate not only its object, but also its own conditions of intelligibility and its entanglement with broader epistemic regimes.

It would be misleading to reduce the variety of theoretical frameworks to a question of methodological preference or ideological allegiance. Each of the paradigms examined—whether formulated in the rationalist grammar of Durkheimian systematics, the interpretive heuristics of Weberian sociology, the genealogical excavations of Foucault, or the intersectional analytics of critical race and feminist theorists—constitutes an intervention within a larger discursive formation. What binds these perspectives is not a shared ontology, but a commitment to rendering the social visible, analyzable, and contestable within different configurations of space, time, and power.

What emerges, therefore, is not a call for synthesis, nor an aspiration toward paradigmatic unity. Rather, the contemporary task of theory may be approached as a labor of translation across heterogeneous logics, a mode of vigilance toward the sedimentation of concepts, and a practice of conceptual displacement through which the familiar becomes strange and the marginal acquires legibility. The multiplicity of voices, traditions, and epistemologies that animate the current field of sociological theory does not paralyze explanation, but displaces its coordinates, compelling the theorist to navigate a space in which no ground remains unmarked by history, contingency, and struggle.

Within such a landscape, theoretical labor no longer resembles the construction

of a totalizing edifice but takes the form of cartographic sensitivity, oriented not toward closure but toward navigation. Categories are not presumed but constructed, not inherited but contested, not stabilized but problematized. The explanatory gesture, far from imposing coherence, works through interruption, resonance, and articulation. In such conditions, the vitality of sociology resides not in its answers but in its capacity to reshape the questions through which the social becomes thinkable.

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# Brain drain and migration of Cameroonian health professionals to developed countries

Emmanuel LINGOK

PhD, University of Yaounde I (Cameroon)

Email:lingokemanuel@yahoo.fr

**Abstract:** *Health workers in Cameroon, including nurses, laboratory technicians, doctors and specialists, work in a difficult environment. Sometimes, the areas where these doctors work have no electricity, drinking water or internet connection, which makes working conditions difficult. In general, their salaries are so low that they cannot make ends meet. By analysing this situation, we can understand why so many health professionals, associates in medicine, disappear, preferring to go and work abroad, especially where the living and working conditions are good and the salary is considerable. This article explores the notion of brain drain from Cameroon and analyses the situation in which health professionals work in their country. It leads us to question the working conditions in which they operate, as well as the reasons for their departure, without forgetting the consequences that result from this loss of clinical expertise.*

**Keywords:** *Brain drain; migration; health professionals; medicine; technical platform; developed countries.*

## 1. Introduction

Although Cameroon has several medical faculties and large reference hospitals, young students prefer to train and work abroad. In the logic of the student doctors, the learning methods, the technical laboratories are not adequate for quality medical training in Cameroon. This is why we cannot compare a young doctor trained in Cameroon with another trained in Europe, for example. Curiously, it is Cameroonian doctors trained in prestigious Western medical faculties who are recruited by major clinics and referral hospitals in the West. And it is these health professionals who receive Cameroonian patients in medical evacuation situations. It should be noted that the technical platform in Cameroon is weak; sometimes it is the medicines that have to be ordered in the West, waiting for their arrival after about ten days, when the patient is dying. According to statistics from the Cameroonian Ministry of Health, 30% of doctors disappear, preferring to work abroad. Faced with this situation, we can see that the emigration of health workers remains very high and that the flight of talent, of human capital abroad, is leading to a loss of clinical expertise in Cameroon.

Authors such as (Victor PICHE et al. 2013:105) consider that migration is broadly defined as a permanent or semi-permanent change of residence. No conditions are placed on the distance travelled or the voluntary or involuntary nature of the move, and no distinction is made between international and internal migration. (Boudon et al 2012:148) define migration as the movement of population from one region to another, especially from rural to urbanised areas, but also from one society to another. In both cases, it is not the most destitute who move, but those who are most likely to become aware of the gap between their aspirations and the possibility of realising them on the ground. Speaking of these movements, which have other aspects and other aims, it should be noted that labour mobility allows bridges to be built between labour supplying and labour receiving countries; migratory flows and supply chains constitute one of these bridges (Hily et al, 2004: 9).

Since the aim of this research is to question the phenomenon of the emigration of Cameroonian doctors abroad, we have to ask ourselves a number of questions. We have developed one main question: What motivates doctors and other medical students to leave their country to train or work elsewhere? Three secondary questions arise from the main question: Why do Cameroonian medical students prefer to train in training units far away from their country? Do doctors who are tempted by attractive offers from abroad have a patriotic spirit? Is offering one's services to others when the country needs them not synonymous with patriotic betrayal? Based on these questions, the following hypotheses were formulated: For the main hypothesis Cameroonian doctors migrate abroad to improve their working conditions and salaries;

Hypothesis (1) Students - doctors and health workers in Cameroon prefer to go abroad for training or work for reasons of academic credibility and socio-professional references. Hypothesis (2) Doctors who migrate abroad in search of easy money are distancing themselves from the patriotic spirit. Hypothesis (3) The emigration of health professionals impoverishes the country of origin in terms of loss of skills and reduction of human capital; hence, patriotic betrayal.

In order to validate these hypotheses, we verified the Durkheimian rules of evidence management by combining theory with experimental practice, while distancing ourselves from methodological determinism.

## **2. Methodology**

Explaining and analysing the causal link between the phenomenon of brain drain in Cameroon and the motives for their departure requires the use of a number of theoretical models and data collection and analysis techniques.

As a theoretical model, we have drawn on Raymond Boudon's methodological individualism, which states that despite the measures taken to reduce the brain drain, the actors have good reasons for doing what they do. The principle of methodological individualism defines an important method in the social sciences. According to this principle, explaining a collective phenomenon always means - at least ideally - analysing this phenomenon as the result of a set of individual actions, beliefs or attitudes (Boudon et al, 2012:122). Methodological individualism is often accompanied by a 'rational' conception of action (the social actor is assumed to have good reasons for behaving as he does). This theory has allowed us to understand and interrogate the emigration trajectories of Cameroonian doctors abroad and, in particular, what motivates them to leave.

In terms of data collection techniques, we had to resort to three techniques, namely: direct observation, individual interviews, life stories. For the first technique, we refer to participant observation; (Quivy and Campenhoudt, 2006: 177) remind us that "sociological observations focus on the behaviour of actors as they manifest systems of social relations as well as the cultural and ideological foundations that underlie them".

Looking at the services, the attitudes of the doctors in the different hospitals allowed us to understand the conditions in which these practitioners work. This observation led us to the conclusion that some doctors who work shifts, after spending a night on call at the hospital, are forced to continue working during the day simply because they want to increase their income. In fact, a doctor who works day and night is lucky if his contributions are increased. The risk here is that the fatigue of the body exposes it to medical errors. Because their salaries are so low, they are forced to extend their working hours and days at the hospital in order to earn more.

The second technique, the individual interview, creates a face-to-face relationship with our interviewee. Using a semi-structured interview guide, we were able to obtain much more in-depth information from our interlocutors, namely the health workers and specialists working in the various hospital training courses.

The third technique, life stories, involves an interview in which the interviewee retraces his or her past; an interview guide developed for this purpose allowed our interviewees to talk in depth about their lives, their studies, their integration into the medical profession and their professional careers. For (Grawitz, 2001: 371) semi-directive interviews are part of the logic of "individual reporting techniques". These are open-ended or semi-directive interviews. Our sample allowed us to conduct our interviews in three large hospitals, namely the Yaoundé Central Hospital, the Yaoundé General Hospital and the Yaoundé Gynaeco-Obstetrics Hospital. A total of thirty (30) people were interviewed, 18 men and 12 women, between March and April 2024.

It should be noted that the collection of this data was effective after a semi-stratified reasoned choice sampling based on the objectives of this research. The information collected was sifted through content analysis and social audit. The results of this research show that doctors trained in Cameroon migrate to other countries in search of opportunities, better professional visibility and good salary treatment.

At the end of the verification phase, we obtained results organised in a body of arguments in six articulations.

The situation of health professionals in Cameroon is characterised by a large number of aspects that we would like to present in the first part of this work. In this regard, we note: the non-recruitment of certain doctors, their poor working conditions, the clinical environment which results in a mediocre technical platform.

### **3. Failure to recruit doctors as a cause of brain drain**

Since the 2020s, we have observed that the unemployment of doctors in Cameroon is still glaring and significant. This means that the number of health workers continues to increase, while the government no longer has enough resources to recruit these young doctors. This situation contributes to the limited recruitment of new graduates into the Cameroonian public service. As a result, many doctors who graduate from training schools or medical schools fall prey to unemployment. During our fieldwork, we met Dr. DIFO, a trained doctor who, instead of falling prey to unemployment and being unable to open his own clinic to practise privately, decided to create an income-generating activity far removed from what he had learned at school. He started a chicken farm and opened a shop to earn money. However, it should be noted that if other medical colleagues want to leave Cameroon to practice medicine in other countries, our interlocutor Dr DIFO has found another alternative that allows him to earn his living freely. However, it should be noted that his ambition is to raise enough money to open a clinic where he can practice well and recruit some of his colleagues.

Apart from the causes that drive away Cameroonian intelligence, we would like to address the problem of lack of equipment that arises in certain hospital training courses. This problem means that doctors see their medical services reduced due to the lack of equipment. And they end up being satisfied with the theory without practising with the appropriate equipment. And knowing that any doctor cannot develop without subjecting his patients to medical examinations using the equipment, he ends up wanting to go and work abroad where hospitals are widely equipped. For (Osar, 2019: 4), Cameroonian hospitals suffer from a lack of equity in access to health care due to the lack of equipment and its unequal distribution, as well as the dilapidation and lack of maintenance of the infrastructure.

Focusing on the problem of non-recruitment of doctors, Doctor Jean Jacques made the following statement during our interviews:

I have been in the service for seventeen years, and the observation here is that many doctors are fleeing because they are not being recruited. They prefer to go abroad rather than be dragged around like simple practitioners in private clinics where they are paid almost nothing. Another thing is that salaries here in Cameroon are not comparable to those of colleagues in other African countries. One of my friends who is a cardiologist in Burkina Faso earns a salary of one million FCFA, while here in Cameroon we barely have two hundred and fifty thousand francs (250,000). This colleague was offered to work in France, but she refused; she is satisfied with her salary of one million in Burkina Faso.

For Mr. Bernard (Mr. Bernard, Laboratory Technician – Biological Analyst at the Gyneco-Obstetrics Hospital of Ngousso):

People leave in search of the best living and working conditions, the best salaries, in search of the best equipment to practice. For example, I work in a laboratory; we had to ask for microscopes with screens to learn better, in order to limit the practice of ophthalmology, especially when we are already old.

In addition to all these testimonies and observations on the ground, Cameroonian doctors declare that they will not continue to be underemployed in clinics where the salary they receive does not even allow them to feed themselves or their families; this is why they prefer to leave Cameroon.

#### **4. The situation of Cameroonian hospitals: poor technical equipment**

A technical or medical-technical platform is a set of places and equipment that allow curative or diagnostic procedures to be carried out, generally in the hospital. In other words, the technical platform is a real nerve centre of a given hospital and represents all the biomedical, technical and IT installations and equipment that allow our health professionals to carry out the diagnostic and therapeutic procedures essential to your care.

Cameroonian hospitals suffer from a severe lack of technical equipment to diagnose, treat or monitor patients. There are only a few hospitals with significant medical equipment (MRI, scanners, PET scanners). Despite the equipment of some hospitals, no hospital has resources for surgical techniques (surgical robots, operating theatres, extracorporeal circulation systems and surgical video endoscopy, etc.). As for specialised equipment for biological analysis (automatons, sequencers, cytometers, etc.), none of the reference hospitals in Douala or Yaoundé has them. With regard to some of the latest generation equipment acquired by some clinics, we note that this equipment, which is essential for the diagnostic and curative treatment of patients, is not well mastered by the medical staff, although they are qualified. To better understand this situation, we present here some testimonies or statements collected from some doctors.

Dr. Marcelle states (Dr Marcelle, 25 years old, 7th year student at the Faculty of Medicine of the University of Douala and on internship at the gynecology-obstetrics hospital in Yaoundé):

The technical platform in our hospitals is very meagre and poor; we also deplore the fact that out of 500 doctors trained each year, only 50 are recruited, while the others are left to their sad fate. There is also a real problem of specialisation in our medical schools. To be honest, I used to be willing to stay in Cameroon; but with the situation we are experiencing here, if I find a mistake, I will leave this country. Another problem is that the number of places for specialisation is very limited; in gynaecology, we take 70 doctors out of the 500 who graduate every

year;

Analysing the words of this young doctor in training, we understand that Cameroonian hospitals have a problem not only with technical equipment, but also and above all with the specialisation of medical faculties.

Another thing that the young doctor noted was the limited number of places for specialisation. Some doctors who have limited access to specialisation are forced into certain fields that do not inspire them. For this reason, those who want to specialise in a certain field at all costs prefer to leave the country and train outside Cameroon. Therefore, we will say that one of the reasons for leaving Cameroon is the limited number of places for specialisation. It should be noted that this situation seems controversial, because for a country whose population is increasing day by day, specialisations require a considerable number of places. By limiting the number of places, the requests of the patients, which are increasing rapidly, do not find the response or the intervention of the doctors in time. In Cameroon, there are less than ten (10) oncologists in this order; the demand is high and they are not able to meet the demand and requests of the patients. The same doctor is expected in several hospitals and in several towns in the same week. As a result, some patients, while waiting to see their doctor for an urgent procedure, end up weakened by the disease that has taken them away.

In the same vein, another doctor from the Yaoundé Central Hospital, who wished to remain anonymous, said

The technical platform of our hospital is not ideal; we who are in the medical profession, we can give health to others, but we are not treated well; no significant benefits; we also note the absence of training offers for our improvement abroad. Our colleagues working abroad are treated at their fair value.

For this doctor, apart from the technical platform, which is poor, doctors who offer health to patients are not treated well in return. In his remarks, he regrets the lack of training opportunities abroad. This situation means that doctors do not innovate in the medical practices they offer to patients; they evolve routinely because of the lack of recycling, because of new discoveries or because of the appearance of some virus.

## **5. Migration of health professionals**

In this second part, we propose to explain the situation of the emigration of health professionals, through the testimonies of doctors who will tell us the stories of their lives.

According to (Iallouchen, Essarsar, 2017: 7-8), Africa is the second most populous continent in the world and the third in terms of surface area, after Asia and America. With an area of 30,22532 km<sup>2</sup> including islands, the black continent occupies 6.0% of the Earth's surface and 20.3% of its land area. For Assia Iallouchen and Mehdi Essarsar, the African continent seems to be particularly affected by the brain drain, given the statistics and the alarming concerns expressed by international organisations and media analyses. The latter are sounding the alarm. They do not hesitate to consider the permanent emigration of qualified African managers as one of the factors that marginalise Africa in globalisation.

The United Nations Economic Commission for Africa (ECA) Regional Conference on Brain Drain and Capacity Building in Africa, held in Addis Ababa on 22-24 February 2000, estimated the number at over 60,000. highly qualified African workers (doctors, university lecturers, engineers, etc.) sold their skills abroad between 1985 and 1990. In response to the concerns of international organisations and the continent's political leaders. According to the Atlas of Migration, sub-Saharan Africa is now home to 17 million migrants internal within the continent and about 4 million in the forty rich countries of the OECD countries, mainly in Western Europe. In this migration, the proportion of is



important in this migration. Today, one and a half million of them come from from Africa. Among these very high figures, Cameroon has almost 20% of its doctors who have gone abroad to work.

In this part of the work, we present some stories, or rather some testimonies, that we have collected from some health workers who have enlightened us on the reasons for the departure of their colleagues abroad.

For theDr. CHEN (Dr CHEN and Dr NSOAN, working at the central hospital in Yaoundé) and Dr NSOANaffirm:

The truth is that the working conditions in our hospitals are really unfavourable; those who have stayed to work in Cameroon do so because they have no other job; and the only thing that holds some of them back is the Hippocratic oath they took when they took up their posts. But I do not want to end my career here in Cameroon. I want to go where doctors are appreciated. But if conditions improve, we can stay and continue to work for our country. Our recommendation is that we can directly integrate young doctors who leave the hospital.

As for the people who run the hospitals, we have to change them after two years, because the longer they stay, the less productive they become. As Mr Zali says: "We have to manage twenty-one (21) patients for one nurse; the work is colossal but the remuneration and bonuses do not follow".

Dr NDZE on duty at the Yaoundé Central Hospital :

The following shortcomings are noted: the hypocritical cloak of democracy; the organisation of the ophthalmology department along clan lines; the opinions of other doctors are not taken into account for the good organisation of care and the achievement of objectives; the proposals made by colleagues for the proper functioning of the department are stifled; this is because of the inferiority complex that prevails.

An ophthalmologist working at the Yaoundé General Hospital :

It should be noted that working conditions in our services are poor; abroad, salaries are appreciated and the medical profession is profitable.

The state must change the living conditions of doctors in Cameroon.

Dr TSE on duty at the Central Hospital :

Abroad, where our colleagues work, the working conditions are better and it is the financial rest that attracts people to leave Cameroon and work there; because here in the country, the remuneration and the treatment of doctors are very poor; in the medical training schools and laboratories of our faculties, training is not provided because of the lack of certain training tools and materials. Sometimes we go abroad to train in certain specialities; because we are used to a certain quality of material there, when we return to Cameroon, we no longer find these tools in the hospitals where we are supposed to provide services. As a result, the service we provide is no longer in line with local realities due to the lack of equipment.

From these various testimonies, we can see that the problem of the exodus of Cameroonian doctors comes from afar. We can understand that the evil is deep; that is why many of these health professionals leave Cameroon, preferring to go abroad in search of the best jobs.

## **6. Migration factors of Cameroonian doctors**

Economic factors refer to the general economic situation of underdevelopment in the country of origin and its consequences: lower standard of living and working conditions that are not conducive to professional development (inadequate or lack of research materials, for example). Some of the doctors interviewed deplore the fact that they have studied medicine for a long time, but their salary does not allow them to live a simple economic life.

Whatever a person's profession or activity, his or her primary goal is to earn enough to support the family. In African culture, the hopes of the family rest on the one who works, although the family generally devotes itself to supporting the studies of one of its members, in the hope that when he is settled or begins to earn money, he will be able to take over the family. A person who succeeds in his studies and gets a job has a moral obligation to repay the attention given to him by his family while he was at school. Therefore, in order to be able to help or satisfy the needs of his family members, he wants to ensure that he earns a lot. Unfortunately, the salary scale in Cameroon is so low that many civil servants, even doctors, cannot make ends meet. In order to survive as a civil servant in Cameroon, you are sometimes forced to steal public funds or to engage in corruption. But it must be remembered that not all civil servants have the means to fly, so they are forced to find ways to leave.

Political factors are related to political instability in the country of origin and, consequently, the risk of being deprived of individual freedoms. For migrants who cite this reason, the search for a certain degree of individual freedom is the main reason for their decision to go abroad. Professional or academic reasons mainly concern the lack of adequate structures for study or research (Célestin BAUD, 2001: 40).

Some developing countries, such as Cameroon, do not have a very efficient medical technical platform; sometimes the medical training and some specialisation programmes offered locally are considered inferior. For this reason, many young doctors are forced to go abroad to improve their skills or start specialisation programmes. However, there are also some who, even if they can pursue their specialisation locally, prefer to do so abroad, for some because of the positive perception of the foreign diploma. It should be noted, however, that once they have completed their years of specialisation, they can make a place for themselves in these countries. There are some who say that it's not necessary to return to work in Cameroon, where you can't make ends meet at the end of the month. Dr Vanessa confirms this situation:

The practice of medicine in Cameroon has a major problem: income. Many colleagues leave the country, either to train abroad or to specialise, and not all of them return to Cameroon. Out of 10 doctors, 6 stayed abroad after training and only 4 returned to Cameroon. In order to prevent doctors from leaving Cameroon, the state must increase the number of doctors recruited each year and raise awareness among health professionals so that they will be happy to work in their country, Cameroon, regardless of the treatment they receive.

In several hospitals where we have conducted direct interviews with health workers, we have observed that several doctors have left the strategic positions they occupied in certain hospitals. Sometimes we find that in a large city with more than two million inhabitants, the number of specialists, especially onchologists and cardiologists, is low and insufficient to meet the needs of the population. Imagine what would happen if the latter left to seek better living conditions elsewhere. The void they leave behind will be considerable. It will take several years for the Ministry of Health to find such experienced specialists to fill this urgent gap. When they do, they will be leaving behind an insurmountable slope that will take a long time to redress. For those who leave will never

return.

In an interview with Doctor Ngontip (Doctor Ngontip, doctor working at the Gyneco-Obstetrics Hospital in Yaoundé), a doctor at the Gyneco-Obstetrics Hospital, the latter states:

Some of our colleagues are trained abroad and do not want to return to Cameroon. As for me, I am not well paid; honestly, if I find an opportunity, I will do what the others do and leave.

In addition to the feeling that drives some doctors to leave the country to seek a better life elsewhere, there is another category of people who refuse to leave despite the difficult working conditions. The latter find it difficult to leave their working and social environment. For (Sjaastad, 2013: 91) people who are more reluctant to leave their familiar surroundings, their families and their friends, migration has a "psychological" cost. Although many are interested in leaving, there are still some who are not ready to give up.

### **7. Deserting doctors who became top managers and experts abroad**

At first, the doctors who decide to leave the country are questioned and criticised for their ambition to leave the country by violating the oath of the hypocrite; they are condemned by the officials of the Ministry of Health; they are almost treated as a category of officials who have betrayed. But strangely enough, a little later, when they manage to break through abroad, when their genius is discovered and appreciated, they become great leaders and experts in the fields in which they were ignored in their country. At that moment, they become an important diaspora, because they are already intervening with a view to helping their country.

According to (Alain Nkoyock, 2015:177):

'The African diaspora in general and the Cameroonian diaspora in particular are numerous and very diverse. It also includes very high level professionals in various fields, who effectively contribute to the economic development of their host countries. We find prestigious academics, researchers in major research centres in Europe and the United States, and senior executives in all sectors of activity.

This means that even doctors who have become brilliant abroad are now joining the circle of African diasporas and are beginning to work for the benefit of their poverty-stricken nation. (Rémi BARRE et al, 2003: 38) do not see the brain drain as a 'crime', let alone an offence. The fact that doctors go to work for others is part of the circulation of skills and intellectual exchange. For these authors The circulation of skills increasingly appears to be the condition for intellectual exchange, technology transfer, the diffusion of innovation, effective training and the transmission of tacit knowledge.

### **8. The irresistible influence of developed countries on Cameroonian doctors**

Economically developed countries have always understood that no development is possible without the rational use of human capital. They have therefore considered it appropriate to promote and develop human resources in all sectors of society in order to encourage each individual to participate in the building of the community as a whole. For this reason, qualified and well-trained people from prestigious schools are employed in local companies and occupy top positions. The aim is to capitalise on these human entities, to improve them and make them useful for the development of society in general. This is why it is difficult to find more than a hundred French doctors working abroad.

At the United Nations Economic Commission for Africa (ECA) Regional Conference on Brain Drain and Capacity Building in Africa, held in Addis Ababa on 22-24 February 2000, it was estimated that more than 60,000 highly qualified African workers (doctors, university lecturers, engineers, etc.) had sold their skills abroad between 1985 and 1990. This is a matter of concern for international organisations as well as for the continent's political leaders.

The share of highly qualified people in this migration is significant. Today, one and a half million of them come from Africa (Remi BARRE et al. 2003: 38).

### **9. Medical deserts in Cameroon: how to retain young doctors attracted by better career prospects abroad**

When discussing the problem of medical deserts in Cameroon, we tend to talk about inequalities in access to care in a situation of medical desertification. In fact, there are many inequalities, the barriers being geographical, economic or cultural. We notice that certain health centres or hospitals are located in areas that are difficult to reach. To get there, especially in the rainy season, you have to use bush vehicles that do not even go there every day. In Ndom, in Sanaga Maritime, Littoral Region, before the road was paved, you had to wait two or three days to reach this place. This was because cars adapted to this road from Edéa left on Tuesdays, Thursdays and Saturdays. If you missed one of these, you would have to wait until the following week, especially if you had not made a reservation. This situation therefore meant that the hospital in this village was always empty, and the medical staff were sometimes absent; it should be noted that the head doctor always spent the weekends in town to visit his small family, who had settled in Yaoundé, Douala or Edea. Some of the doctors we approached told us that working and living in a place without electricity and with an unstable or non-existent Internet network was an ordeal for them. According to them, working in such an area led them to cut themselves off from the world of research, which would like us to update our knowledge and professional practices.

According to (Vanessa Ezaane Gonta 2023: 1), despite the implementation of structured health policies with the support of technical and financial partners, the opportunity to receive proper care seems to remain a real challenge in Cameroon.

When analysing this situation, we note that the government of Cameroon has made efforts to build hospitals and health centres in the different localities of Cameroon, even in the most remote areas. Strangely enough, it has not thought about the social aspect, which requires that the working conditions of the medical staff be well organised. This situation has led many of them to desert or, even better, to abandon their posts, leaving the hospital in a "comatose state", where evacuated populations or pregnant women in labour sometimes lose their lives for lack of medical assistance.

Many doctors working in rural areas face very uncomfortable working conditions. In general, these places are not electrified and are not even connected to the drinking water network. However, the hospital benefits from the support of the state, which provides it with a generator to provide lighting. Sometimes, due to a lack of fuel in the area, the generator stops working and the hospital is suddenly plunged into darkness. At night, when a patient arrives, be it an accident victim or a woman in labour, we are forced to use torches or flashlights. Faced with this situation, which forces the medical staff to work in the dark or without internet connection, the doctors on duty are forced to ask to be sent to big cities. These doctors are constantly absent from their posts because, according to them, they cannot endure the ordeal or torture of very poor living conditions. It has been observed that once these doctors have managed to gather the resources to leave, they leave the hospital and go abroad.

According to a general practitioner, the latter declares:

If doctors were well treated and well paid, they would not threaten to leave Cameroon. In rural areas, working conditions are even worse: no electricity, no water, no internet. A young doctor who is used to these comforts will not leave once he is sent to places where hospitals do not even have electricity. That is why many resign.

To be honest, poor working conditions in rural areas are one of the reasons why doctors leave their jobs and move to other places.

#### **10. The issue of international mobility of health workers**

In her statement of 26 March, Amy POPE, Director-General of the International Organization for Migration (IOM), identified conflict, violence and climate-related disasters as the main drivers of displacement in Africa and around the world. In this case, the type of displacement that concerns us here is the mobility of health workers who leave their countries for a variety of reasons. Indeed, the exodus of Cameroonian doctors calls into question the reproduction of society and the strengthening of good medical practices at the community level. According to (Angela Flora MENDY, 2014: 58), wage differentials push workers from low-wage countries to move to high-wage countries. International migration is a rational and individual decision to invest in human capital. Faced with this situation, Cameroon, like the rest of Africa, is experiencing a shift in the structuring of its human resources, especially in the field of medicine. According to (Sauneron, Kerouedan, 2011: 208), the crisis in human resources for health in developing countries is a multifactorial phenomenon. The migration of African doctors to developed countries is therefore part of this problem and at the forefront of policy makers' concerns. It is clear that the migration of African doctors to developed countries is a crisis that is not conducive to the continued strengthening of community medicine. The majority of African doctors met, both in Africa and in Europe, spontaneously express their dissatisfaction with the conditions of practice of their profession in their country of origin and with their own expectations. They say they are disappointed with the working, training and living conditions offered to them. They speak of failing health systems, corrupt authorities, the weakness of the professional resources at their disposal, dissatisfaction with low pay, pressure from families, the gap between their aspirations and the means to achieve them (Mendy, 2014: 62).

In studying the effectiveness of policies, strategies and instruments on the practice of medicine in Cameroon, we would like to refer to Angèle Mendy, who offers us a series of analyses on a specific migration, namely those doctors from the African continent who have come to make a career in the countries of the North, mainly at the call of hospital services or international recruitment agencies, but also as independent practitioners. Several thousand doctors with African diplomas, originally from the Maghreb, Egypt and sub-Saharan Africa, are now working in Europe. If the countries of North Africa and Egypt account for 75% of the workforce, sub-Saharan Africa, with Madagascar and Mauritius, accounts for the remaining 25% - (Mendy, 2024: 7).

In order to question the international mobility of Cameroonian doctors to other places, it is necessary to analyse the working conditions in which they develop. First of all, it should be noted that the data on medical demography in Cameroon are poorly known, because we know the number of doctors registered with the Order, but we do not monitor exactly those who leave. We simply note that the hospitals are empty; sometimes these doctors, when they leave, do not report to be replaced. In general, there are some who leave and continue to receive their salaries, so they are afraid that if they report, their salaries will be suspended.

According to Lallouchen and Essarsar (2017: 11), in the face of repeated failures of development projects and the unfulfilled promises of national leaders, *development* remains a hollow buzzword—or even a never-ending story—in many Third World countries. Confronted with this alarming reality, the vital forces of society, especially young people, emigrate to developed countries in an attempt to escape their miserable fate. This aversion to—or rejection of—the traditional way of life is largely attributed to ineffective, archaic, and ultimately unappealing forms of governance. It reflects the profound frustrations and underlying aspirations of African populations, whether in the form of a longing for an imaginary Eldorado or as symptoms of nostalgia for a lost paradise.

Consequently, Cameroon, like the rest of the African continent, appears to be particularly affected by the brain drain, given the statistics and the alarmist concerns of international organisations and media analyses. The latter are sounding the alarm. They do not hesitate to consider the permanent emigration of qualified African managers as one of the factors marginalising Africa in globalisation.

## 11. Conclusion

In conclusion, the emigration of doctors from Cameroon—a clear manifestation of the brain drain phenomenon—stems from multiple interrelated causes. Chief among them are the limited local opportunities, chronic economic instability, and the persistent lack of adequate employment and professional development prospects for qualified health personnel. Drawing on Baud's (2001: 143) sociology of "deserters," emigration to Europe can be understood as a form of "luxury migration," one that presupposes access to financial capital and robust social networks. Yet, despite the barriers, this form of migration remains a real, attractive, and often rewarding option for many.

The analysis of this phenomenon, as articulated by Célestin Baud, reveals that the socio-professional environment in which Cameroonian doctors operate is generally not conducive to their long-term development or fulfillment. This explains the significant scale of their emigration, often motivated by the desire to reach professional and personal heights abroad, where they perceive their living and working conditions to be substantially enhanced.

According to *The Atlas of Migrations*, sub-Saharan Africa currently hosts approximately 17 million internal migrants, alongside 4 million individuals settled in the wealthiest OECD countries, primarily in Western Europe (Bernard, 2008: 156). Cameroon is no exception: it has seen a growing number of its health professionals relocate to other parts of Africa, as well as to Europe and the Americas. This outflow poses serious challenges for the national healthcare system, particularly by depleting the country's pool of highly trained medical personnel and undermining its capacity to capitalize on domestic professional expertise.

In order to mitigate this ongoing exodus, the Cameroonian state must urgently commit to strengthening institutional support for healthcare professionals. Improving their working conditions, remuneration, and career prospects is essential if the country is to retain its skilled workforce and reduce the allure of emigration.

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# The Role of Interpersonal Relationships in Shaping Professional Life

**Ileana Simona DABU**

PhD. Lecturer, West University of Timisoara (Romania)

Email: ileana.dabu@e-uvt.ro

**Valentina Cătălina BOBOCEL**

Student, West University of Timisoara (Romania)

Email: valentina.bobocel01@e-uvt.ro

**Abstract:** *In this study, we want to highlight how interpersonal relationships can influence both professional and personal life. Along with this, we want to discover what career success means to others, the emphasis that individuals place on the relationships they have with others, the impact that interpersonal relationships have within the organization, and more, all focusing on the general theme. Professional success depends on many factors, but the most important being the people around us, who have a great influence on the personal and professional development of each of us. It is important to identify and treat negative interpersonal relationships as early as possible, in order to minimize their negative effects on individuals. It is also important to invest time and energy in building and maintaining positive relationships, which can have a beneficial impact on mental and physical health and on personal development, as we presented above. This research is a qualitative one that aims to highlight the importance of interpersonal relationships on career success.*

**Keywords:** *interpersonal relationships; career success; networking; organizations; leadership skills.*

## 1. Interpersonal relationships and successful career

In general, interpersonal relationships can have a significant influence on mental and physical health, as well as on academic and professional performance and personal development. It is important to invest time and energy in building and maintaining positive relationships so that life is fulfilled and healthy.

Positive interpersonal relationships can contribute to the development of positive connections, and from these relationships, many employees find fulfillment. In this positive relational context, employees have the opportunity to fulfill their "need to belong". (Heaphy & Dutton, 2008: 33)

"Positive interpersonal relationships in the workplace can also have a dark side of their own, because their development may depend, at least to some extent, on the formation of negative relationships with others. For example, if someone were treated with contempt by a coworker, they might legitimately seek emotional support from another coworker." (Reich & Hershcovis, 2011: 44)

It is important to identify and address negative interpersonal relationships as early as possible to minimize their negative effects on individuals. It is also important to invest time and energy in building and maintaining positive relationships, which can have a beneficial impact on mental and physical health and personal development, as discussed above.

In the environment in which we live, society influences us in choosing and practicing a certain profession. It is well known that in the process of socialization, the person tends to be like others, but at the same time, wants to manifest his individual peculiarities. This fact also applies to professional development." (Dandara, 2013: 1314)



In general, interpersonal relationships can have a significant impact on career success. People who develop and maintain strong and positive relationships can benefit from an expanded network of contacts, can be more effective in managing conflicts and in creating a positive and collaborative work environment, which can lead to greater job satisfaction and career success. "It is important to invest time and energy in interpersonal relationships at work in order to be successful." (Smith, 2020: 35)

As for career success, it can be defined in many ways, but generally it refers to achieving professional and personal goals in a field of activity. This can include obtaining a high salary, advancing in position, obtaining recognition or awards in the field of activity, or completing important projects.

Jim Meade (2000, p. 175-178) suggested that career success is the result of personal experience and can be considered as personal experience and the accumulation of real or perceived achievements.

Factors that contribute to career success can vary depending on the field of activity and the individual's perspective, but generally include:

- Competence and skills - The ability to perform tasks and fulfill responsibilities successfully can be a key factor in career success. This can include technical skills, such as specialized knowledge in a particular field, as well as communication, problem-solving, and decision-making skills.

- Education and training - A solid and continuing education, as well as additional professional training, can help develop the skills and competencies needed to advance in a career and achieve success.

- Interpersonal relationships - Positive interpersonal relationships with colleagues, clients, and managers can help develop a network of contacts and obtain referrals and career opportunities.

- Motivation and Commitment - Motivation and commitment to one's career can help maintain a high level of performance and develop a positive attitude towards career challenges and opportunities.

- Planning and Time Management - The ability to plan and manage time effectively can help prioritize important tasks and accomplish them efficiently.

These factors can interact and vary depending on the situation and the individual's career context. "For career success to be present, professional activity must be kept under control, and the requirements and obligations in the field must be planned and efficiently accomplished." (Trofăilă, 2019: 198)

Personal life, work and hobbies are the three major coordinates that balance the life of each social individual. Even though these needs differ from one person to another, the financial side means much more than financial stability. Here it is also about the satisfaction that a job brings you, and productivity within it is also different. (Cojocari, Crivoi, & Căpățînă-Darii, 2015: 166)

In organizations, interpersonal relationships are extremely important, as they can affect the performance and efficiency of the organization.

Interpersonal relationships can also influence the professional development of employees and the organization as a whole. Positive relationships can lead to the formation of a network of contacts and the acquisition of career opportunities, as well as to the increase of the organization's reputation. On the other hand, negative relationships can lead to the loss of career opportunities and the damage to the organization's reputation.

They are an important factor within organizations because they can affect performance, efficiency, decision-making and professional development. It is important for organizations to encourage and develop positive interpersonal relationships among employees by promoting a culture of communication and collaboration.

Interpersonal relationships can have a significant influence on the way people make decisions, communicate, and act within organizations. Here are some ways in which they can influence decision-making, leadership and communication in the professional environment:

- **Decision-making:** Social relationships can affect the way people make decisions through social influence. That is, people can be subconsciously influenced by the opinions, values, and behaviors of others they interact with. This can lead to a slower decision-making process or to choosing an option that is not necessarily the best for the organization.

- **Leadership:** Interpersonal relationships can have a significant impact on a person's leadership skills. A charismatic leader who can create strong relationships with his employees can be much more effective in inspiring and mobilizing people to achieve organizational goals. At the same time, a leader who cannot develop strong relationships with his employees may have difficulty achieving his leadership tasks and objectives.

- **Communication:** Interpersonal relationships can affect the way people communicate within the organization. People who have strong relationships may have greater trust in others and may be more willing to communicate effectively and openly. Conversely, people who have weaker relationships may have difficulty communicating and working together, which can lead to communication problems and conflicts within the organization.

## **2. The Importance of Networking on an Individual**

Digital and social technologies can be successfully used to improve communication and build professional relationships in the business environment. However, it is important to find a balance between the use of digital technologies and face-to-face interaction in order to maintain healthy and effective interpersonal relationships within organizations.

Digital and social technologies have had a significant impact on the way interpersonal relationships are built and maintained in the business environment. Today, there are a variety of social media platforms and digital tools that can be used to improve communication and build relationships within organizations. "The many social media channels we have access to are primarily interpersonal communication tools designed for people to connect." (Carnegie, 2011:144)

## **3. Methodology**

The present study is based on qualitative research, because through the semi-structured interview it was possible to collect the data necessary to achieve the proposed objectives.

In this study, we started from the following objective, namely: identifying the effect that interpersonal relationships have on the career success of individuals.

From the framework objective of this study, the following specific objectives resulted, such as:

- Identifying the positive/negative influence that interpersonal relationships have on an individual;
- Identifying the level of satisfaction of an individual, related to his current career;
- Identifying the effect that networking has on a person;
- Identifying the impact that interpersonal relationships have in organizations;
- Identifying the importance of communication on interpersonal relationships, but also on achieving success in professional life.

The people who were interviewed are divided between people who, according to their words, have managed to achieve success in their careers, but also people who are trying to achieve this.

They have the following professions: Waiter, HR Specialist, IT Programmer, Recruitment Specialist, Administrative Staff, Junior HR Generalist, Human Resources Technician, Clinical Supervisor, Commercial Assistant and Sales Agent.

#### **4. Research results**

To subtly introduce them to the research topic, each individual was asked "How is your relationship with colleagues at work?". Here, most of the interviewees answered that they have a good or even very good relationship with the team, but also with their superiors, so M.I. answered that the relationship he has with his colleagues "It is very good, I can say that we get along very well and even from the beginning they helped me a lot to adapt and learn all the things I know at the moment."

A fundamental question of this theme was *"Do you consider interpersonal relationships to be important in an individual's life? Why?"*. I asked this question at the beginning, but also at the end of the interview with the intention of finding out if the opinion would change along the way or with the aim of finding out additional information, following the discussion, being like a small conclusion after the interview.

To this question, all the interview participants answered that interpersonal relationships are important, thus R.B. answered that they *"influence our attitude, influence our character, the way we behave and basically this depends on the people we have around us, and we tend to take over certain behaviors, certain values, principles, from the people with whom we establish some interpersonal social relationships"*.

Regarding the impact that interpersonal relationships can have on an individual's personal and professional development, most said that interpersonal relationships have a very high impact and *"if you surround yourself with people who have a career or who work to have a career, it also determines you to have a much more active professional life, to want more, to improve yourself and to learn more in your field of activity"* (B.R.).

Most interviewees responded that these have a strong impact on an individual, regardless of whether it is a matter of personal or professional development. Also, these relationships can not only have a positive impact, but can also be negative in some situations. For example, M.D. said that *"in professional life, if interpersonal relationships are not of good quality, I think it affects you a lot and can*

*ruin your mood*", at the same time, she gave a personal example from the workplace and said that: *"if I have a disagreement with someone, my whole day is thrown into turmoil, meaning I can no longer be myself and I no longer give my best at work"*.

Strong interpersonal relationships are difficult to build, but it is different for everyone this and they develop them in a unique and personal way, functioning largely differently. However, following the interviews, I found that I also found some common things, with respondents considering that they developed strong interpersonal relationships *"through communication"* (M.I.), *"because I am very sociable"* (D.C.), *"being an open person"* (N.M.), *"I am a sociable, communicative and open person"* (C.P.), *"through collaboration"* (M.D.), these being just a few examples taken from their statements.

A fundamental theme of this research is both individuals' vision of success, and the influence of those around them in achieving it. For everyone, career success is different, for some career development is important: *"for me, career success represents the efficient fulfillment of organizational objectives and those set by me, as an employee, to bring a plus to this field"* (A.C.), for others a high position within the company: *"I would really like to be a Team Leader or even higher"* (D.C.), *"for me, career success can mean the fact that I want to reach a management position"* (R.B.)

Regarding the influence that interpersonal relationships at work have on achieving success, those interviewed answered that they helped them develop professionally, but also personally: *"they helped me grow professionally and learn as much as possible, and this also developed my performance"* (A.C.), *"I used them to be able to overcome shyness"* (B.R.).

Another interesting question, from my point of view, was whether they would give up their current job if it did not give them the necessary satisfaction or if they were not fulfilled professionally, regardless of whether the salary level was high or not. Here we wanted to observe different types of people, those who prioritize the financial situation, those who mostly want development at work, represented by a high position, those who emphasize the relationship with others in the professional environment or people who like comfort and stay at their current job, really do not have the opportunity to develop, and the salary level is low.

M.I. suggested that she is most interested in interpersonal relationships at work: *"Honestly, the first time I would look at the relationships with colleagues and how I could get along with them, what are the principles, what are the values of the company"*, saying at the same time that she would not be tempted to stay if she were promised a lot of money and the company environment was not suitable. R.B. answered the following: *"I don't see why I wouldn't quit my current job if it keeps me very static, meaning I would prefer to go somewhere else where I know for sure that I can advance, I know that I can learn more and the salary doesn't matter"*, for this reason, career development and advancement are important.

Interpersonal relationships are easily created, each individual can interact with the team at work and not only, being just a collaborative relationship or a momentary interaction, but the important question would be, how can positive interpersonal relationships be developed and maintained at work. Thus, the interviewees answered largely the same, maintaining relationships being shaped based on communication: *"communication and understanding what is being conveyed to you ... are the key to success"* (L.C.), *"when we have a problem, let's help each other solve that problem together, always, because that's why we are a team"* (B.R.), *"I was helped by my colleagues and supervisors to overcome obstacles and develop my skills better, and I helped in turn"* (A.C.)

Conflicts are inevitable in the workplace, whether they are based on minor or major things, what is important is how they are resolved in order to be harmonious. Therefore, we asked the interviewees how they deal with conflicts or tensions at work, and B.R. replied: *"I try to take each side and see what the solutions would be"*, and A.C. concluded that: *"I try to stay calm and discuss the problem amicably to seek solutions together"*, noting that they want to resolve the conflict, not leave the problems unresolved.

Communication is the key to resolving conflicts or tensions, but what happens to those who are not always positive or cooperative? Several of those interviewed answered the following: *"I try to make the person in question get into a better mood or I simply try to let them experience their feelings, so that later, when they feel better, they can come to me"* (D.C.), *"I try to be as assertive and understanding as possible and to understand them too"* (C.P.), *"I try to communicate assertively with them and reach a middle ground so that we can collaborate together, and when discrepancies arose between me and my colleagues, we tried to discuss and solve the problem so that we are all well"*, noting that they cannot leave things unresolved, but try to solve that problem.

At the same time, criticism and negative feedback can positively influence an individual, improving their professional skills as a result. Basically, feedback can be of two types, negative, which leads nowhere and is only said to make the person feel bad, or constructive, from which you can improve. Most of the time, right at the beginning of the journey, we all make small mistakes at work, but superiors and the team contribute to the improvement of the employee, thus coming with that constructive feedback that is in our support.

Networking is very important in a career and as L.C. said, *"it is important to connect with people, both from your area of expertise and from other areas ... if you connect with people, you have chances to evolve and learn new things, somehow it is inevitable that the people you know will not help you get somewhere"*. A.C. used it *"to create as many relationships as possible with different specialists, to be able to learn new things ... to find employment opportunities"*.

In support of networking, there is the LinkedIn application that a very large part of people who are looking for a job use, mostly focusing on "white collar" positions. R.B. also confirms that *"LinkedIn is the largest professional networking network and that helps a lot, first of all, because you can create a profile of your experience, your studies, your attitudes and changes you have, but at the same time, there are a lot of people who are looking for talents, looking for people with as many actions related to a certain field as possible and more diverse"*.

Within an organization, harmony is very important for achieving success, thus, interpersonal relationships between employees need to be close and strong, managing to develop the company in the most appropriate way. Therefore, when the interviewees were asked how interpersonal relationships can help the company develop, the answers were as follows: *"When people help each other, it's about the power of the many and automatically things improve and go better and automatically the company progresses, if there were only conflicts there, they can't progress"* (M.I.), *"if you have an efficient team that collaborates well, if you find the right person in the right place, if you encourage communication, if you encourage openness and transparency, somehow success is guaranteed"* (D.C.).

Analyzing the answers, the majority believe that harmonious interpersonal relationships within the company help its development, but also to a job well done, concluding with results to match.

Leadership skills are not innate, they are built over time and at the same time, they come with certain responsibilities, with leaders having as responsibilities to lead, to help, but most importantly, to inspire people. Also, a question asked to the interviewees in my research was how a mentor or a person with more experience can help them develop in their career, and as answers, I received many examples from their lives, considering that we all need a leader or mentor to guide us, at least at the beginning of our career, but not only. Thus, D.C. believes that *"we all need a mentor because it is normal, when you first join a company, not to know all the footnotes"*. C.P. was very motivated at work by her mentor, saying that she later wants to follow in her footsteps, she told me that: *"the mentor helped me a lot because she came with some perspectives and some impulses that I had never encountered before and the biggest impact she had on me, so to speak, was the way of speaking, of relating to people"*. At the same time, the role of a mentor is to support an employee, R.B. noting that *"the role of a mentor is to transmit knowledge, know-how, to be by your side when you do something and to say that what you are doing is good, you are on the right track. Also, the role of a mentor is to involve you in work processes that are as complex as possible, so that you can develop."*

As I said at the beginning, I concluded the interview with the following question: *"Finally, I want to ask you, what is your opinion, do you think that interpersonal relationships influence the career success of individuals? Can you elaborate?"*. With this, we wanted to observe the opinion of the interviewees, as a small conclusion, following the interview we had with them. All of them answered that interpersonal relationships are very important for career success, stating the following: *"I believe that interpersonal relationships greatly influence career success, because as I was saying, for me, more than money and other material things, who the people I work with are also very important."* (M.I.), *"It helps and yes, it influences career success because, as I said at the beginning, a person who is very closed in and who comes to work just to work, will not be so supported and so well seen by others"* (D.C.), *"Yes, I believe that the people you are surrounded by have an impact, whether positive or negative, on you. Why is that good? Because when you are part of a toxic team or the communication in your team is not working or the people in your team are not the most compatible, somehow there is a risk of failure for the team, but when dialogue is encouraged, when you know that you can be transparent and go to that person and say ok, let's discuss problem x, let's see how to smooth the situation and reach the best results, somehow you know that you can bring success, both for the team, for the company and therefore, for yourself."* (L.C.), *"Yes, I think that it greatly influences the relationships we have with the people around us in the development of our career because, as I said at the beginning, we are social beings, we are made to be surrounded by people and the more good, strong, positive relationships we have, the people around us, every person we meet contributes something to our state and does something for us, the easier it is to pave our way to success"* (C.P.).

These are just a few opinions extracted from the research, noting that they consider that interpersonal relationships, whether at work or in private life, can greatly influence the career, but not only, also leading to success at work, being interpretable for each person individually.

## 5. Conclusions

This study was conducted with the aim of observing whether interpersonal relationships influence the career success of an individual, to what extent and how they can bring professional satisfaction.

People are social beings, they cannot be isolated, and relationships with those around them help their well-being, but also their personal and professional development. At a professional level, good interaction with superiors and colleagues can mean a lot to the employee, but also to the company they work for.

After analyzing the results, we found that employees feel much more fulfilled at work if their relationships with others are good. At the same time, we noticed that good relationships between individuals, according to those interviewed, are the basis for communication, but also for mutual support and help. These help a lot within a company, because the level of employee performance is higher, considering that their state depends on the interactions they have with others, some of the respondents mentioning that if relationships with others are not good, their performance decreases.

Also, interpersonal relationships cannot always be perfect, but sometimes disagreements also occur, so, following the answers collected, we noticed that the interviewees never leave problems unresolved, always jumping into solving them. The main means by which they succeed in this is through communication, in order to find a common means of resolving the conflict.

Career success is defined differently by each person, depending on what they want, saying that that thing or things signify success. Some individuals are satisfied with good collaboration with the team and superiors, for others, career success signifies a high position within the company, but the salary level received also contributes to the satisfaction of others.

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# From Stigma to Style: Tattooing and the Transformations of Social Status

Valentina-Violeta LEFF

PhD Student, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: valentina\_draga@yahoo.com

**Abstract:** *This article investigates, from an integrative sociological perspective, the social functions of tattooing, with a focus on the symbolic and structural transformations that this bodily practice has undergone in modern and postmodern societies. From a historical marker of marginality—imposed by punitive institutions or exclusionary social norms—tattooing has, in recent decades, become a privileged medium for articulating personal identity, affirming collective belonging, and accumulating symbolic and social capital. The analysis is structured into four thematic sections that explore tattoos as mechanisms of group cohesion, as forms of reflexive individualization, as expressions of taste and social distinction (in the Bourdieusian sense), and as vehicles for negotiating visibility and legitimacy across different social contexts. Drawing on a complex theoretical framework that integrates the contributions of Pierre Bourdieu, Anthony Giddens, and recent empirical research in cultural sociology and body studies, the article argues that tattoos are not reducible to mere ornaments but constitute dense practices of meaning-making and inscription of the self in relation to social structures. Moreover, it critically addresses the unequal access to the forms of capital associated with tattooing and the ambivalence of social evaluations shaped by gender, class, occupation, and aesthetic normativity. Thus, tattooing is analyzed as a practice situated at the intersection of expressive freedom and the symbolic regulation of the body in contemporary society.*

**Keywords:** *tattooing; social identity; symbolic capital; bodily expression; cultural distinction.*

## 1. Introduction

Tattoos, once associated with deviance and marginality, have increasingly become mainstream expressions of identity and aesthetic preference. Historically, their functions were largely shaped by practices of exclusion and control. In ancient Rome and Greece, tattoos (or “stigmata”) were imposed as punitive marks on slaves, prisoners, and other socially stigmatized individuals (Jones, 1987). Similarly, during Japan’s Edo period, tattoos were used to brand criminals, signifying their outsider status (Yamada, 2009). These historical associations contributed to the enduring view of tattoos as markers of social deviance.

In recent decades, however, the cultural status of tattoos has shifted considerably. In Western societies, especially among younger cohorts, tattoos are increasingly framed as legitimate forms of self-expression, aesthetic choice, and even social capital. A Pew Research Center survey (2010) reported that nearly four in ten Americans aged 18 to 29 had at least one tattoo, a figure that points to the normalization of body art among Millennials. At the same time, tattoos have become more prevalent across gender, class, and occupational lines, including among professionals, academics, and public figures.

Despite this mainstreaming, the social meanings of tattoos remain complex and context-dependent. Research indicates that individuals with visible tattoos may still face negative stereotypes in certain professional or conservative environments (Timming, 2011). Moreover, gendered double standards persist: women with tattoos are often judged more harshly than men, particularly with respect to perceived promiscuity, competence, or social conformity (Swami & Furnham, 2007).

## 2. The Function of Group Belonging

Throughout history, tattoos have served as powerful markers of group identity, functioning not merely as aesthetic choices but as visible signs of inclusion within specific social, cultural, or ideological communities. In many traditional societies, tattooing was closely tied to rites of passage, initiation rituals, and social hierarchies. For example, in Polynesian cultures, elaborate tattoo patterns indicated a person's lineage, status, and warrior achievements, forming a crucial part of communal identity and collective memory (Gell, 1993). Similarly, among the Māori of New Zealand, the *moko* facial tattoos were (and continue to be) deeply embedded in genealogical, spiritual, and tribal belonging (Nikora, Rua, & Te Awakotuku, 2007).

In modern societies, tattoos continue to perform the function of signaling group membership, albeit within more fluid and diverse social formations. Subcultural studies have extensively documented the role of tattoos in expressing affiliation with particular lifestyle groups such as punks, bikers, goths, metalheads, or anarchist collectives. These groups often adopt specific visual codes—including distinctive tattoo designs—that act as symbols of shared ideology, resistance to mainstream values, and internal cohesion (Atkinson, 2003).

Sociologist Michael Atkinson (2003), in his foundational ethnography of tattooed subcultures in Canada, argues that tattoos are not merely decorative but function as "badges of identity" that enable individuals to locate themselves within alternative communities. For many of his respondents, tattoos provided a means of affirming a chosen collective identity, particularly when that identity was marginalized or misunderstood by dominant social norms. Tattoos thus operate as both boundary markers and bridges—simultaneously distinguishing insiders from outsiders and reinforcing in-group solidarity.

Beyond subcultures, tattoos also fulfill a social function in military, religious, and activist contexts. Military units across cultures have long used tattoos to cultivate a sense of brotherhood, commemorate shared experiences, and perpetuate traditions of valor and loyalty (DeMello, 2000). Similarly, in religious milieus, such as among Coptic Christians in Egypt, small cross tattoos on the wrist symbolize both faith and communal resilience in the face of persecution (Fahmy, 2011). These examples underscore how tattoos can condense complex systems of meaning into instantly recognizable symbols that bind individuals to collective narratives and histories.

Furthermore, recent scholarship highlights that tattoos can be a means of negotiating belonging in postmodern and urban contexts marked by fragmentation and individualism. Larson and colleagues (2014) have shown that tattoos can simultaneously foster a sense of autonomy and relational anchoring, allowing individuals to craft a coherent identity while affiliating with broader movements or ideals. In this view, tattoos operate as both tools of personal storytelling and social signaling, helping individuals claim space within fluid networks of affinity.

While the meanings attached to group tattoos may vary across time and context, their function in anchoring individuals within social structures remains remarkably consistent. Whether signifying ancestral pride, subcultural rebellion, spiritual conviction, or professional camaraderie, tattoos act as material inscriptions of belonging—writing the collective onto the body.

## 3. The Function of Individualization and Self-Expression

In late modern societies characterized by increasing reflexivity and emphasis on personal autonomy, tattoos have come to serve as salient instruments of individualization and self-expression. The human body, traditionally shaped by collective norms and

institutional regulations, is increasingly perceived as a site of self-construction and personal authorship (Giddens, 1991). Within this context, tattoos function as embodied narratives through which individuals communicate aspects of their biographies, identities, and existential orientations.

Contemporary tattoo practices reflect a significant departure from historical forms of corporeal inscription imposed from above—such as branding or punishment—and instead foreground agency, intentionality, and personal meaning. Empirical studies have consistently demonstrated that self-expression ranks among the most frequently cited motivations for tattooing, alongside remembrance, identity reinforcement, and aesthetic preference (Wohlrab, Stahl, & Kappeler, 2007). Individuals often choose tattoos that commemorate life transitions (e.g., the birth of a child, the loss of a loved one), symbolize personal beliefs or values, or reflect enduring aspects of their character or worldview.

This trend is particularly evident in the rise of custom-designed tattoos, where the wearer collaborates with the artist to produce a unique visual statement. As Sanders (1989) has shown in his ethnography of tattoo culture, the customization process is not only aesthetic but also symbolic, enabling individuals to perform and reinforce their self-concept in a deliberate and embodied manner. Tattooing thus becomes a means of narrating the self through visual and corporeal codes, giving form to otherwise intangible dimensions of identity.

Furthermore, tattoos can be seen as acts of reclamation and empowerment, particularly among individuals who have experienced trauma, marginalization, or alienation from dominant social scripts. DeMello (2000) argues that in such cases, tattooing serves a reparative function, allowing the body to be “rewritten” in alignment with personal agency and healing. Survivors of abuse, for example, may tattoo over scars or inscribe empowering symbols that reframe their corporeal experience. In this way, tattoos become not only statements of identity, but also testimonies of survival, resistance, and transformation.

The self-expressive function of tattoos is also embedded in broader aesthetic regimes. The selection of style (e.g., realism, tribal, minimalist, biomechanical), placement on the body, and degree of visibility are all deeply personal choices that communicate the wearer’s desired relationship with themselves and with others. Tattoos may be deliberately hidden, intimate, and introspective, or openly displayed as declarations of lifestyle, creativity, or ideology. The act of choosing where and how to display a tattoo involves a negotiation between the private self and public perception—a balance between internal coherence and external recognition.

Nevertheless, while tattoos have become normalized in many cultural contexts, their function as tools of self-expression is not without social constraints. As Timming (2011) has demonstrated in workplace ethnographies, individuals with visible tattoos may still face subtle or overt discrimination, especially in formal professional environments. Tattoos that signal personal meaning for the wearer may be misread as unprofessional, irresponsible, or even threatening by others. This disjuncture reveals the ongoing tension between the emancipatory promise of body art and the enduring power of social norms in regulating appearance and behavior.

In sum, tattoos operate as embodied sites of meaning-making, allowing individuals to express, affirm, and perform their unique identities. They are both artistic and autobiographical, aesthetic and existential. In an era where identity is increasingly fragmented, performative, and self-authored, tattooing serves not only as a medium of personal expression but as a technology of the self—one that materializes interiority in visible, lasting form.

#### **4. The Function of Symbolic and Social Capital**

In contemporary societies, tattoos have evolved from markers of deviance to symbols of cultural distinction and social connectivity. Drawing on Pierre Bourdieu's concepts of symbolic and social capital, tattoos can be understood as embodied assets that confer prestige and facilitate access to social networks. Symbolic capital refers to the recognition and legitimacy granted to individuals possessing culturally valued attributes, while social capital encompasses the resources and advantages derived from one's social relationships (Bourdieu, 1986).

The transformation of tattooing into a recognized art form has significantly enhanced its symbolic capital. Kosut (2013) discusses the "artification" of tattooing, wherein the practice has been recontextualized within the domain of fine art, leading to increased legitimacy and esteem. This shift has elevated the status of tattoo artists and their clientele, particularly those who engage with renowned artists or possess intricate, custom designs, thereby signaling refined taste and cultural sophistication.

Moreover, tattoos serve as indicators of social capital by facilitating connections within specific communities. Silversides (2013) explores how heavily tattooed individuals utilize tattoo parlors as "third places"—social environments distinct from home and work—to cultivate relationships and community ties. These spaces provide opportunities for social interaction, networking, and the exchange of cultural knowledge, thereby enhancing individuals' social capital through shared experiences and affiliations.

However, the accumulation of symbolic and social capital through tattooing is not uniformly accessible. Factors such as socioeconomic status, cultural background, and geographic location can influence individuals' ability to engage with tattoo culture in ways that confer prestige and social connectivity. For instance, access to renowned tattoo artists or participation in certain tattoo communities may be limited by financial constraints or social barriers, highlighting the intersection of tattooing with broader structures of inequality (Bourdieu, 1984).

In conclusion, tattoos function as potent instruments of symbolic and social capital in contemporary society. Through their aesthetic qualities, associations with esteemed individuals and groups, and capacity to facilitate social connections, tattoos enable individuals to express and enhance their cultural and social standing. Nonetheless, the benefits derived from tattooing are mediated by existing social hierarchies, necessitating a critical examination of how access to the symbolic and social capital associated with tattoos is distributed across different populations.

#### **5. Conclusions**

The social functions of tattoos have undergone a profound transformation, evolving from instruments of stigmatization and exclusion into complex markers of identity, belonging, and distinction. Historically used to marginalize and control, tattoos have been reappropriated in the modern era as tools for self-expression, group affiliation, and social recognition. This shift reflects not only broader changes in aesthetic and cultural norms but also deeper structural transformations in how identity is constructed, negotiated, and displayed in late modernity.

As explored in this article, tattoos serve multiple overlapping roles. They operate as signs of group belonging, inscribing collective narratives and social affiliations onto the body. From traditional tribal systems to contemporary subcultures, religious groups, and activist communities, tattoos have functioned as both visual declarations of solidarity and as mechanisms for reinforcing group cohesion. At the same time, tattoos offer individuals

a powerful medium for individualization and self-expression, enabling them to materialize deeply personal experiences, values, and aspirations. The body becomes a canvas for identity work, where the visual permanence of tattoos asserts continuity, intentionality, and authorship in a fragmented social world.

Beyond these expressive functions, tattoos have also come to embody symbolic and social capital. They now circulate within systems of taste and distinction, where design, execution, and the reputation of the tattoo artist confer status and legitimacy. Tattoos can signal aesthetic sensibility, insider knowledge, and subcultural prestige. In some contexts, they open access to social networks, creative industries, or cultural scenes, acting as embodied passports to specific communities. However, as Bourdieu reminds us, capital—whether symbolic or social—is unequally distributed. Not everyone can access the same styles, artists, or meanings. Tattoos may reinforce existing inequalities by reproducing hierarchies of class, cultural literacy, and bodily presentation.

Crucially, the meanings attached to tattoos remain context-dependent and ambivalent. While tattoos may confer prestige in artistic or youth-oriented milieus, they may still trigger stigma in conservative, formal, or professional settings. Women, in particular, continue to face gendered scrutiny regarding their tattooed bodies. Thus, tattoos are not neutral expressions of identity but socially situated acts that carry varying consequences depending on who wears them, where, and how they are read.

In conclusion, tattoos exemplify the tension between autonomy and structure, visibility and judgment, personal meaning and collective interpretation. They are expressive, relational, and strategic. Understanding their social functions requires moving beyond simplistic dichotomies of rebellion versus fashion or deviance versus art. Instead, we must situate tattooing within the broader field of social practices through which individuals craft, claim, and contest their place in the world. As enduring, embodied symbols, tattoos offer a vivid lens through which to explore how bodies speak—and how society listens.

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# Organizational Culture and Leadership

**Miroslava QUANITTA ȘTEFANIA**

PhD Student FÎC (MILOȘ), West University of Timișoara (Romania)

Email: miroslava.milos76@e-uvt.ro

**Abstract:** *This paper explores the relationship between organizational culture and leadership, emphasizing how leaders shape and adapt culture to align with institutional goals. The study investigates different leadership styles and their impact on organizational performance, highlighting the role of transformational and transactional leadership in fostering innovation and stability. Organizational culture is based on the values and norms accepted by the employees of the institution. The leader can shape and model the culture of an organization by defining its values, norms, regulations, and mission. An effective leader is one who harmonizes the goals of the employee with those of the organization. The leadership style is an important element of organizational credibility. The leader must leverage the organization's strengths and be aware of the weaknesses in its organizational culture in order to minimize them. Leaders should focus on people, encourage employee participation in setting goals and other group decisions, strengthening mutual trust and respect.*

**Keywords:** *leadership style, performance, managers, rules, value system.*

## 1.Introduction

The concept of "culture" emerged with the identification of ethnic and national differences by researchers in sociology, anthropology, and social psychology. This concept is based on values and norms that are either accepted or rejected by society. In addition to these, it involves everything that is considered important/unimportant, functional/non-functional, being a mix of intangible norms. The entire body of specialized literature agrees that any type of culture has both positive and negative effects on humanity as a whole. For employees of an institution, organizational culture is crucial for understanding the environment in which they are going to carry out their activities. (Aydin, 2018)

Organizational culture represents a mix of the past, present, and sometimes future of an organization, as it is made up of both positive and negative experiences the company has gone through. Every organization possesses a unique culture with a mixture of elements from all types of organizational cultures, but it is distinct due to the specific elements present. (Gresoi & Matei, 2020)

Nguyen et al. (2020) observe organizational culture within an institution as a reference model for all members due to the value system oriented toward the company's performance. Organizational culture can be perceived positively when the organization's performance is qualitative, and employees are satisfied.

Regardless of the type of organization, Roșca (2019) argues that the influence of all components, as well as the organization as a whole, depends on the prevailing organizational culture, which in turn conditions the functioning of the organization. A close connection has been observed between organizational culture and leadership styles, as they are the main pillars that play an important role in the success of each organization.

Aydin (2018) emphasizes the importance of understanding an institution's organizational culture and affirms that the type of culture identified is directly associated with the institution. The author states that the leader and their leadership style can manipulate and manage organizational culture once they fully understand it. Acar (2012) believes that a leader can form and shape an organization's culture over time. Acar (2012) also emphasizes the importance of the leader within the organization, as they are able to define the values, norms, regulations, and the mission of the organization.

## **2. The Relationship Between Organizational Culture and Leadership**

Organizational behavior is closely related to individual factors, group dynamics, and the structure of organizational culture. Organizational behavior is based on organizational leadership, and therefore, leaders must establish an intelligent strategic direction since all these factors are reflected in the way employees approach their tasks. (Buga, 2023; Northouse, 2021)

The leader can modify the organization's culture through their ability to get others to follow them. Schein believes that leadership and organizational culture cannot be treated as separate subjects and concepts because they depend on each other; he views them as two sides of the same coin. The organization's vision is the mirror between organizational culture and the leader. The organization's vision refers to the set of norms and values that are intended to be implemented. Thus, the leader's profile is closely linked to the organizational vision because the leader relates to the organization both in the present and in the future. (Zelenschi, 2017)

The concept of the leader is reflected in the organizational culture, as the leader is viewed from the perspective of the organizational culture they come from. In the long term, understanding one's own organizational culture is the only anticipatory method for both leaders and employees to overcome challenges and improve institutional performance. (Zelenschi, 2017)

The approach to critical situations and managerial practices is dependent on the organizational culture of the institution. Leadership styles, the way tasks are completed, how change is handled by both the institution and employees, as well as the social climate within the institution, all reflect the organizational culture and depend on the type of organizational culture the company has. (Zelenschi, 2017)

Leaders need organizational culture to be efficient, as it helps them search for and find patterns of values and behaviors that have provided stability and validity to the company over time. Through this method, leaders can teach employees how to relate to the organization and critical situations without adopting a superior attitude. (Khan et al., 2020; Eskiler et al., 2016; Khan et al., 2018)

Thus, production-oriented leaders set high performance standards and ensure they are met, organize tasks carefully, and provide work methods while closely monitoring the team's activity. People-oriented leaders encourage employee participation in goal setting and other group decisions, strengthening their mutual trust and respect. (Marica, 2008)

An effective leader is one who harmonizes the employee's goals with those of the organization. (Marica, 2008)

Leaders ensure proper organization, coordination, and control so that the organization can achieve its objectives in the shortest time possible. Additionally, the leader coordinates activities well and tries to correct deviations from the target. Organizational leaders take calculated risks to adapt to change. The leader has a vision and guides employees toward common objectives. (Sendar, 2021)

In the organizational structure, employees are prepared to take on responsibility. (Sendar, 2021)

In successful organizations, it has been observed that leaders tend to adopt a leadership style that stimulates employee creativity, as well as the development of a creative style among the members of the organization that generates ideas and challenges thinking. Transformational and transactional leadership styles play an important role in adopting creative behavior at the workplace; however, organizational culture, the organization's resources, and the members' skills also contribute to institutional success. It has been observed that leaders who desire organizational performance adopt a positive



stance toward organizational culture to identify with it and communicate values and norms to employees. (Khan et al., 2020; Merkpör & Dartey-Baah, 2017; Yu, 2017)

Naqshbandi & Tabache (2018) believe that leaders are able to shape organizational cultures that foster creativity and support innovative ideas. Leaders play an important role in developing and shaping organizational cultures that focus on assimilating and acquiring modern knowledge. In addition to all the practical roles organizational culture plays within institutions, it also mediates between leadership styles adopted by the institution and creative work behavior.

Organizational culture is closely linked to the leadership style the organization has adopted. For institutions to be competitive and have sustainable advantages, the leadership style must align with the employees so that the objectives can be achieved. Just like the type of organizational culture adopted, leadership style is an important element of organizational sustainability. Lam et al. (2021) consider the concept of organizational culture a determining factor for the long-term success of an organization. Organizational culture is seen as a direction that influences workflow, dynamics, and how clients are treated.

Lam et al. (2021) state that any type of organizational culture has a significant influence on leadership styles. For leadership styles to succeed, they must align with the type of organizational culture present.

Paicu & Garbuz (2020) assert that successful leaders are able to positively influence the organizational collective through organizational culture and managerial culture. Both organizational and managerial cultures influence attitudes, perceptions, and behaviors of both leaders and employees. A successful leader recognizes the influence a strong organizational culture has on the entire collective.

Both organizational and managerial cultures can merge if there is a manager with leadership competencies who highlights a beneficial intellectual and emotional model for employees. How the leader increases their persuasive capacity is related to their own culture and the system of principles and values that guide their actions. (Paicu & Garbuz, 2020)

Leadership does not start from an already existing socio-cultural stage, as there are patterns that already exist and provide strong elements for identifying the cultural process of leadership. Paicu & Garbuz (2020) claim that most leaders are directed by organizational culture, as the set of values and norms provides broad parameters in which the manager forms. However, how leaders act can affect the organizational culture already formed. In this regard, leaders' actions can independently shape different elements of organizational culture, which is also true for informal leaders.

Over time, examples of leaders who have changed organizational culture are rare, mostly observed only in extreme situations such as economic crises or in newly established organizations, as changing organizational culture is a difficult process involving the modification of a large structure of ideas, values, attitudes, and behaviors. (Paicu & Garbuz, 2020)

In the study conducted by Paicu & Garbuz (2020), it is highlighted that both managers and informal leaders are strongly influenced by the ideological and cultural context of the company. The creative and innovative ideas that the manager or informal leader develops are more likely to succeed if they align with the values promoted by the organization, which are part of the predominant values of the organizational culture. The informed leader is more of a transmitter than a master of organizational culture, compared to the manager who contributes more or less intentionally as an engineer of culture.

Throughout contemporary periods, those who have succeeded in modifying an organization's culture have been leaders. Thus, the way leaders positively modify the culture of the organization and, in turn, its performance, and how leaders can negatively modify the institution's culture, is identical. Leadership styles, strategies, as well as the set of norms and values possessed by the leader contribute either positively or negatively. An unprepared leader with an unhealthy set of values can quickly destroy a long-established organizational culture. (Warrick, 2017)

Silverman (2015) believes that the type of culture an organization has represents both a treasure and a vulnerability for the institution. The researcher states that the leader can maintain a healthy culture depending on the behaviors and attitudes they promote but can also damage it quickly if they involve vulnerabilities that cause that type of culture to lose its value.

The leadership style adopted by leaders and the managerial strategy are visible and transparent processes, easily observed compared to understanding organizational culture, which reacts like an evasive leverage anchored in the past but with effects in the present. Thus, culture involves a series of unspoken behaviors, attitudes, and norms. Both in positive and negative periods, organizational culture and institutional leadership are undoubtedly connected and cannot be separated. Most often, founders or leaders who achieve higher performance improve organizational culture and successfully instill new values and action norms. (Groysberg et al., 2018)

Groysberg et al. (2018) argue that the most beneficial thing a leader can do for the organization is to recognize the importance of culture and manage it within organizational performance. Leaders must recognize the predominant type of culture and maximize its values to bring benefits to the institution. At the same time, the leader must be aware of the weaknesses in organizational culture to manage and minimize them. Reduced risks, once weaknesses are minimized, are an important factor in the organization's full functioning.

### **3. A Method for Investigating Organizational Culture**

The instrument used for the research is the O.C.A.I. TEST. The O.C.A.I. Test was created by specialists Kim S. Cameron and Robert E. Quinn. They developed a method for diagnosing organizational culture using competing organizational values, which correspond to four types of organizational cultures: clan, hierarchical, adhocratic, and market-oriented cultures.

Over time, various research models in the field of organizational culture have been developed. The Competing Values Framework (CVF) was created to understand the main factors and indicators of effective organizations. This model is based on two bipolar dimensions. The first dimension consists of: flexibility, discretion, and dynamism, while at the opposite pole are stability, order, and control. The second dimension focuses on: unity, internal orientation, and integrity versus rivalry, differentiation, and external orientation. The intersection of these two dimensions gives rise to four important cultural subdomains in the academic field of organizational culture. These four types of cultures are: clan, adhocratic, hierarchical, and market-oriented (Naranjo-Valencia et al., 2012).

**Adhocratic Culture (Creative):** In this structure, it is believed that innovative and pioneering initiatives lead to success. These types of organizations primarily operate to produce new products and services and to prepare for the future. The main task of management is to promote entrepreneurship, creativity, and cutting-edge technological activities (Jones et al., 2005).

**Market Culture (Competitive):** The Market Culture operates through economic mechanisms of the market, competitive dynamics, and monetary exchange. In other words, the primary focus of the market culture is on transactions with other support groups to gain a competitive advantage (Deal & Kennedy, 2000).

**Hierarchical Culture (Control):** According to Ouchi (1985), bureaucratic mechanisms tell a person: "Do what we tell you, not what you want, because we pay you for it."

**Clan Culture (Cooperation):** At the core of this model is the opportunity for people to fail as a team and compensate for mistakes together. It is expressed as a friendly place where people spontaneously share a lot. Success is defined by the organizational climate and concern for people (Cameron & Quinn, 2011).

These types of cultures are based on the following organizational characteristics: the dominant trait of the organization; organizational leadership; human resource management/personnel; organizational cohesion; the organization's strategy; and reward criteria. Over time, these four subdomains seem to convey contradictory messages. A simple example is related to managers who want their companies to be adaptable and flexible but, at the same time, easily controlled and with increased stability. The quadrants of this model represent organizational values that are above programs and the organizational collective (Naranjo-Valencia et al., 2012).

Cameron and Quinn (2011) divided organizational culture into several types: the hierarchical organizational culture is focused on absolute control, formalities, and procedures that lead the way. This type of organizational culture is a picture of contemporary bureaucracy. The market-oriented organizational culture focuses on competition, with a strong interest in the organization's position in the field, but this does not stop only at the organizational level, as it is also reflected within the organizational collective to increase productivity.

Cameron and Quinn (2011) approached the clan-type culture as one that is oriented toward human resources, where the values involved refer to teamwork, active participation, and respect among employees. The methods that support this type of culture include: open communication, human resource development, and involving the entire collective in decision-making, all focused on participatory involvement and training. A new culture, the adhocratic type, highlights entrepreneurial approaches, dynamism, adaptability, flexibility, as well as innovation and creativity. Employees are motivated by the importance of the tasks assigned to them and by the orientation towards horizontal communication to avoid inferiority complexes.

The **Competing Values Framework** provides methods for diagnosing the organizational culture of the institution, but also concrete examples that demonstrate the connection between organizational culture and human resource management and company leadership. Through the lens of the **Competing Values Framework**, Cameron and Quinn developed a new methodology for evaluating organizational culture called the "Organizational Culture Assessment Instrument" (OCAI) (Cameron and Quinn, 2011).

Cameron & Quinn (2006) developed the OCAI instrument to identify the type of organizational culture and create a more realistic strategy for transforming it. By applying the instrument and identifying the dominant cultures, the gaps become smaller, and the deficiencies can be modified during the new organizational transformation. The OCAI instrument is based on competitive value. Cameron & Quinn created the **Competing Values Framework** theory as a framework for organizational culture. The theory focuses on six dimensional organizational cultures: dominant characteristics; organizational management; leadership; organizational links; strategic alignments; and performance criteria.

Over time, the **Organizational Culture Assessment Instrument (OCAI)** has been used in national and international research because it allows the identification of these six dimensions, as well as the understanding and identification of organizational culture types.

#### 4. Conclusions:

Leadership style is a constant way for a leader to relate to tasks and people. Leadership emerges as an interpersonal influence aimed at achieving the organization's goals. The concept of organizational culture serves to explain how the organization functions and interacts with the external environment. Knowing organizational culture is valuable as it constitutes the anticipatory element of an organization.

An important role in organizational culture is played by the leader. The leader is the one who sets the directions, values, and behaviors that must be followed, and through their actions and decisions, they influence the atmosphere and internal norms of the organization. An effective leader not only understands organizational culture but actively cultivates it, helping the organization stay connected to the values and principles that guide it.

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# The Role of Self-Esteem in Managing Academic Stress within the Social Context of the COVID-19 Pandemic

**Sorin PRIBAC**

Professor PhD, West University of Timișoara (Romania)

Email: sorin.pribac@e-uvvt.ro

**Diana Maria POPESCU**

PhD Student, West University of Timișoara (Romania)

Email: diana.popescu95@e-uvvt.ro

**Abstract:** *This article investigates the role of self-esteem in managing academic stress within the social context of the COVID-19 pandemic. The purpose of the study is to analyze the relationship between academic stress and self-esteem among students at the West University of Timișoara. The research employs a qualitative approach, utilizing semi-structured interviews to explore students' subjective experiences of academic stress, online learning, and self-esteem. The study reveals that high self-esteem is correlated with greater confidence, resilience, and proactive attitudes towards academic challenges, while low self-esteem amplifies anxiety and procrastination. The findings highlight the significant impact of the pandemic on students' stress levels, emphasizing the increase in anxiety and depression due to social isolation and the transition to online learning. The study concludes that improving self-esteem and providing better support for students can enhance their ability to manage academic stress effectively. Recommendations include clarifying academic requirements, providing timely feedback, and fostering social support to reduce perceived stress and improve psychological well-being.*

**Keywords:** *academic stress; COVID-19 pandemic; self-esteem; anxiety; online learning.*

## 1. Objective

Stress is a complex social phenomenon, influenced by a multitude of factors, including the environment, social groups, economic, political and legislative issues, as well as individual needs and perceptions. The COVID-19 pandemic has greatly amplified students' perceived stress levels, highlighting a significant increase in anxiety among students due to social isolation and the transition to online learning. As a recurrent and relevant theme that can be applied to all fields of activity, stress can be generated and amplified by the environment, the groups to which we belong or aspire to, ongoing economic, political, legislative issues, as well as by the specific needs, goals, values, perceptions of everyone. Stress also occurs both in the context of force majeure or political tensions, such as wars, riots, protests, pandemics, high levels of corruption, poverty, and in the context of everyday life, where small and personal details contribute to the individual's coping with stress.

Investigating the relationship between self-esteem and stress management in the academic environment is an essential endeavor with profound implications for both educational performance and students' emotional balance. In an increasingly competitive academic context, academic stress - caused by the pressure of assessments, high workloads and uncertainties about the future career - can become a vulnerability factor with negative effects on mental health and learning efficiency.

Within this framework, the level of self-esteem significantly influences how students perceive and manage academic challenges. High self-esteem is correlated with greater confidence in one's own abilities (Mruk, 2006: 110), increased resilience and a proactive attitude towards difficulties, thus facilitating the adoption of effective coping strategies. Conversely, low self-esteem can amplify anxiety, procrastination and avoid perceived difficult situations, contributing to a vicious cycle of stress and decreased

academic motivation (McKay&Fanning, 2000: 147).

This paper aims to analyze the relationship between academic stress and self-esteem among students at the West University of Timisoara. The two mentioned variables have a strong impact on both mental and physical health and on the actions taken by students, especially in the context of the pandemic-driven changes, which have generated the move of study programs to the online environment.

Recent studies on perceived stress and the psychological health of students and alumni highlight a common concern to identify and manage factors contributing to academic stress, particularly in the context of the COVID-19 pandemic. In this respect, research by Auserwald, Koddebusch and Hermann (2024), James, Henshaw, Lourie et al. (2023) and Keyserlingk, Yamaguchi-Pedroza, Arum et al. (2022) explore the impact of the pandemic on students' perceived stress levels, highlighting significant increases in stress, anxiety and depression among students. These studies emphasize the importance of psychological factors and self-efficacy in managing academic stress, suggesting that students with high self-efficacy and good self-regulation skills are better equipped to cope with academic challenges.

In parallel, research by Reis, Saheb, Parish et al. (2021) and Rackemann, Hamilton, and Keech (2023) focuses on stress management strategies, emphasizing the importance of self-directed strategies and interventions based on implementation intentions. These studies suggest that integrating student perspectives into service planning and delivery can help to reduce perceived stress and improve psychological well-being. For example, Reis, Saheb, Parish et al. (2021) found that Australian students use a variety of self-directed strategies to manage stress, and Rackemann, Hamilton, and Keech (2023) evaluated the effectiveness of an implementation intentions-based intervention to promote problem-focused coping behavior, finding that it had a significant effect on action planning but not on other variables such as coping behavior or psychological well-being.

The studies by Lei, Wang, Dai et al. (2022) and Haspolat and Yalçın (2023) address the issues of academic efficacy and psychological symptoms among high school students. Lei et al. emphasize the role of academic self-efficacy and social support in improving academic performance, highlighting that academic resilience partially mediates the relationship between academic self-efficacy and academic performance, and social support moderates this mediation process.

In contrast, Haspolat and Yalçın highlight the impact of parental achievement pressure, perfectionism, and academic expectation stress on students' psychological health, suggesting that these variables mediate the relationship between performance-oriented assessment and psychological symptoms.

The common thread running through these papers is an emphasis on identifying and managing the factors that contribute to the perceived stress and psychological health of students. Integrating these perspectives can contribute to the development of more effective support programs that address both academic and psychological issues. Thus, the literature suggests that interventions aimed at improving self-efficacy, social support and coping strategies can have a significant impact on reducing perceived stress and improving the psychological well-being of students and pupils. These studies provide a comprehensive perspective on how perceived stress affects learners, highlighting the importance of well-structured interventions and appropriate support to reduce the negative impact of stress on psychological health and academic performance.

The negative effects of stress are particularly felt if there is no respite between stressful situations, the more intense and long-lasting the stress, the more the cognitive filter is impaired and predisposed to categorize more elements in the external environment as harmful to the internal balance, thus amplifying the state of tension and

the individual's fears related to personal control in relation to social control. Cognitive function plays an important role in the interpretation of stimuli acting on the organism and in the formation of emotional response (Barbu, 2017: 25). The fact that it offers a vision of increased personal control regardless of the degree of freedom, expression or social constraints is a positive aspect of this theory. The individual has greater control over how he/she reacts to threats, daily pressures.

In the complexity of its forms, stress is influenced by a multitude of factors, which makes it. The coexistence of global and personal features is a fundamental characteristic of stress which has provoked a great deal of discussion among researchers, as stress varies in terms of its components depending on the individual, the environment and the culture.

Academic stress is mainly defined as tension and anxiety resulting from test preparation and task completion (Baiyan, Qun & Young, 2024: 71). It occurs when students feel a heavy academic burden and causes negative emotions such as anxiety and fear of failure. When the stress is not maintained at an optimal level, the student experiences anxiety, depression, irritability, irritability, fatigue, burnout accompanying hyper stress, respectively in the case of hyperstatic with apathy, lack of satisfaction, motivation in relation to the educational process in which he/she is involved. One of the dimensions of academic stress is online educational activities. Reorganization of the educational process in the online environment reflects not only necessity, but also the ability of teachers and students to adapt to new teaching, learning and assessment, which involve the use of available digital platforms for the uninterrupted support of the study programs followed. The effectiveness of online courses and seminars depends on the cohesion existing in the teacher-student group, since assertive communication and cooperation are the main elements that determine the success of the proposed educational approaches. Indicators of academic stress in the online environment are stressors, coping style, discrepancy between ineffective reactions to stress and preferable reactions. Following the presentation and examination of stressful situations faced by students, measures to prevent academic stress in the online environment are proposed. Another dimension of academic stress is that of continuing studies in the pandemic context. In this regard, we have the following indicators: the presence of motivation in performing tasks, the existing psychosocial climate.

## **2. Method**

The qualitative approach allows a phenomenological, comprehensive orientation in relation to the processual nature of academic stress and self-esteem variables among students at the West University of Timișoara. In the context of the pandemic, online learning, moving online has become a fundamental way to support the continuity of university studies, so that the health of both students, teachers, administrative staff and teachers is not harmed. Through the type of research chosen, the relevance of students' perspectives on the meanings and representations of stress experienced at university and self-esteem influencing the response to stressors is highlighted.

The general objective of our paper is to analyze the relationship between academic stress and self-esteem among students at Timișoara University Center in relation to the educational changes caused by the pandemic. The relevance of the addressed issue led us to analyze the relationship between the two variables, because faced with unforeseen situations and imposed social alienation, individuals react in effective ways.

The specific objectives outlined an attempt to trace the impact of self-esteem on stress responses in relation to educational activities organized, planned and implemented



in online format. The first specific objective proposed for analysis is to identify academic stressors in the online environment. The second specific objective is to analyze the coping style in relation to the self-esteem of the interviewees. The relationship between students' self-efficacy and commitment, respectively, and the two analyzed variables will be followed. The third specific objective is to highlight the relationship between self-esteem and interpersonal conflicts at university.

The research instrument used in this study is a semi-structured interview, based on an open-ended question guide, which aims to explore students' subjective experiences of academic stress, online learning and self-esteem.

The interview is oriented in two broad directions: (1) identifying stressors and coping mechanisms and (2) exploring self-esteem and relationship to self, allowing a flexible exploration of students' experiences, while providing the opportunity to identify diverse perspectives and recurring patterns in students' experiences, as well as encouraging them to express their personal opinions, allowing a deeper understanding of how stress and self-esteem influence their academic journey.

The first part of the interview (questions 1-6) investigates *pressing situations*, factors that contribute to academic stress, students' emotional and behavioral reactions to challenges, and the strategies they find effective for managing pressure. Particular attention is paid to the impact of the online environment on stress levels and student-teacher interaction: 1. *In the past month, what were the pressing situations you experienced;* 2. *What factors amplify academic stress in the online environment;* 3. *What are the reactions, responses to challenges, threats that you are not proud of;* 4. *How do you think it is most effective to respond to pressures;* 5. *In the context of social isolation and online learning, what are the steps you take to manage concerns, worries;* 6. *In relation to online learning activities, what stress prevention measures would you recommend?*

The second part of the interview (questions 7-12) explores *students' perceptions of themselves*, highlighting both the traits and skills they appreciate and the aspects they criticize: 7. *What personal traits, abilities do you value positively;* 8. *What personal traits, aspects do you frequently criticize;* 9. *In terms of your relationship with yourself, what resolutions do you have;* 10. *What values guide you in online learning;* 11. *What is the frequency and method of resolving interpersonal conflicts at college;* 12. *In relation to the activities you are engaged in, what are the achievements, endeavors, challenges that you constantly appreciate?*

It also investigates the values that guide their learning and how they define their personal and academic achievements.

Through this tool, the research provides a detailed insight into the challenges faced by students in the university environment, highlighting both the objective difficulties of online learning and the psychological factors that influence academic resilience.

The research was conducted among students in master's programs at the University of Timisoara. To ensure the confidentiality and anonymity of the data collected and processed, only the level of studies, gender and age will be specified. The chosen subjects are in the second year of the master's program and are aged between 23-52 years. Six females and four males responded to the invitation for an interview based on the field of interest presented above. The interviews were conducted by telephone between May 19 and May 24, 2020. With the permission of the chosen subjects, the telephone calls were recorded to reproduce the answers to the questions as faithfully as possible. The chosen subjects related to the stressful events they faced described the ways in which their internal system of values, opinions, feelings interact with the objective, external structure.

### 3. Results & discussion

The academic university experience is undoubtedly one of the most complex stages in a student's life, marked not only by the accumulation of knowledge, but also by managing a significant workload and adapting to the demands of a competitive environment. Academic stress is a ubiquitous phenomenon among students, and the increasingly prevalent online environment adds several additional challenges. The responses collected provide a detailed picture of the difficulties faced by students, the mechanisms by which they try to manage stress and the impact that educational and personal factors have on their self-esteem and highlight a complex reality. While some manage to maintain their equilibrium through rigorous organization and effective time management, others face challenges that seem to overwhelm available personal resources. In addition, online learning has intensified the difficulties, through perceived isolation, the lack of a clear demarcation between academic and personal life, and the perception of poor communication between teachers and students.

**Main sources of academic and personal stress:** Academic stress can be triggered by a myriad of factors, but for most of the students interviewed, the main source was the heavy workload, tight deadlines and lack of clarity about academic requirements. F.I., a 23-year-old student, describes with frustration how projects and essays are constantly overlapping without clear planning, which makes it very difficult for her to complete her dissertation. A similar perspective is offered by L.E., 24, who confesses that almost every week she has to complete a project, a task made even more difficult with the shift to the online format.

In addition to the difficulties related to workload, students also point to another major problem: the uncertainty generated by the lack of a clear structure in the organization of courses. R.F., aged 23, explains how, in the absence of a well-established routine, she sometimes gets stuck, and on days when the stress is high, she fails to make any progress at all on her dissertation. Similarly, A.T. suggests that professors should be more explicit about how they assess, so as not to leave students in a permanent state of uncertainty.

In addition to academic pressures, some students also face personal difficulties that amplify stress levels. R.M., for example, describes how, in addition to the challenges of university, he has to deal with problems at home and conflicts with his family, which creates a general state of prolonged tension. Likewise, D.V., who works parallel to his studies, feels overwhelmed by the time when he must respond to numerous documents at work.

**Stress Management Mechanisms:** How each student copes with these pressures varies significantly. Some choose to create a well-structured plan to divide their time efficiently. L.E., for example, points out that the secret to her success is to organize tasks according to priorities so that she doesn't become overwhelmed at the peak times of the semester. R.S. shares a similar perspective, emphasizing the importance of setting a fixed schedule that also includes relaxation periods to avoid burning out.

In contrast, other students recognize that they tend to procrastinate, which only intensifies stress. R.M. admits that procrastination is one of his involuntary ways of reacting to stress, although he realizes that this behavior may harm him in the long run. In the same situation is C.G., who, although he starts documenting ahead of time, leaves the practical part of the projects until the last minute.

For other students, social support plays an essential role in maintaining emotional balance. C.G. emphasizes the importance of strong friendships, where she can communicate openly about difficulties. F.I., for his part, believes that the simple act of sharing problems with close friends has a beneficial effect on his emotional state.

**Impact of Self-Esteem on Stress Reaction:** An important aspect highlighted by the analysis of the responses is how self-esteem influences the perception of stress. Those who are more confident in their own abilities, such as R.F. or A.T., seem to cope better with academic pressures, seeing them as challenges that can be overcome through organization and discipline. On the other hand, students who show perfectionist or self-critical tendencies, such as R.M. or C.G., are more prone to anxiety and procrastination, as they fear that their results will not be good enough.

**Recommendations for Reducing Academic Stress:** To improve the academic experience of students and reduce the impact of stress on their performance, it is essential that both educational institutions and students take concrete steps. Teachers could better clarify academic requirements and provide quick feedback on assignments so that students do not have to navigate in a constant state of uncertainty. In addition, making assessment methods more flexible and adjusting the volume of homework according to the semester period could help to alleviate the pressure felt by students.

On an individual level, students could benefit from time management techniques and strategies to avoid procrastination. Creating a clear demarcation between study time and free time could help maintain a psychological balance. Encouraging communication and social support could also be a key factor in managing long-term stress.

#### 4. Conclusion

The analysis of the responses shows that academic stress is a complex phenomenon, influenced by both educational factors and the particularities of individual students. While some manage to effectively organize their time and adopt proactive strategies, others face significant difficulties in managing pressures. In the longer term, better communication between teachers and students, more flexible academic demands and the development of individual coping strategies could contribute to a more balanced and performance-friendly learning environment. The analysis of the responses also provides a sociological perspective on academic stress, highlighting the complex interplay between the individual and society, the impact of global events and the importance of self-esteem in managing stress. These sociological dimensions are key to understanding how social structures and norms influence individual behaviors and perceptions, and how individuals respond to social challenges and pressures.

In terms of academic stressors in the online environment, the selected subjects mentioned: high volume of assignments, demands, limited time to complete tasks, lack of communication, moving courses and seminars online, attendance, incorrectness, online exams, not following the schedule, relationships, lack of face-to-face interaction, use of webcams and microphones, uncertainty, and in some cases their own time management weaknesses. The high volume of homework projects was the most mentioned academic stressor in the online environment, students argued that moving online caused a significant increase in the number of tasks they had to complete. After examining the data obtained, students with negative self-esteem are prone to a high level of stress, determined not necessarily by the number of factors listed, but by the relationship with these factors causing anxiety and depression, while students with positive self-esteem were not affected by stressors over a long period of time. As measures to prevent stress in the academic environment, students argued the importance of communication, optimal use of technology, a stable schedule of accomplishing tasks correlated with clear objectives, effective time management and implementation, following a clear structure of the subjects studied. As can be seen, preventive measures combine the correction of personal weaknesses with the improvement of institutional characteristics.

The second specific objective related to the relationship between self-esteem and

coping style reveals that personal values, the way of managing stress, the discrepancy between ideal and ineffective ways of coping with stress are not differentiating criteria between the two variables studied, but self-acceptance, self-respect, personal beliefs about achievements, respectively about the ratio of strengths-weaknesses are certainly fundamental ways of differentiating the forms of self-esteem. In the context of self-efficacy, students with a negative self-evaluation amplify their level of distress through constant devaluation, while students with a positive self-evaluation have confidence in their strengths and in the fact that they can succeed regardless of the challenges and threats they face. The variable commitment to study programs does not show significant differences in the sample studied, both students with positive self-assessment and those with negative self-esteem strive to complete assignments, dissertation to fulfill all the criteria for graduation. All students who participated in the sociological research undertaken are responsible, motivated individuals. Students with positive self-evaluation tend to be satisfied with everything they achieve, students with negative self-esteem are anxious although they have fulfilled their academic obligations.

The third specific objective regarding the relationship between self-esteem and interpersonal conflicts at the faculty reveals that the interviewed subjects did not have conflicts with colleagues or professors, preferring to communicate and apply human values such as responsibility, fairness, and honesty in the established interactions. It is important to note that we especially considered the university environment, the students being in the second year of their master's degree focused much more on their resolution to complete the study programs they followed, on their desire to evolve, thus they had no intention to engage in interpersonal conflicts at the faculty. During their years of study, the interviewed students developed effective mechanisms for developing and maintaining intrinsic motivation. However, although there were no conflicts at present, the fact that students with negative self-esteem are included indicates that there have been interpersonal conflicts in the past, which most likely resulted in tension, criticism, rejection, feelings of inferiority, or not belonging to the collectives they were part of. Thus, while students with positive self-esteem avoid conflicts, opting for communication and understanding, students with negative self-esteem tend to avoid situations that remind them of unpleasant aspects of the past.

In conclusion, the research has achieved its objectives. Self-esteem has a significant role in personal and professional training and development, and implicitly in the way to manage stress in different areas of activity. With a realistic assessment of one's own self-worth, the individual's degree of satisfaction and contentment with the responsibilities assumed and personal achievements accumulated increases. Emotional balance is a topical issue, particularly in the current social context. With a view to new research directions, I suggest studying the relationship between academic stress, self-esteem and personal marketing to examine the impact of external influences on internal ones, starting from the premise of a self-image favorable to achieving the desired success.

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# Comparative Social History: The Formation of National Culture in Romania and Portugal

**Adrian OTOVESCU**

Professor PhD, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: adiotovescu@yahoo.com

**Andrei JILCU**

PhD Student, Doctoral School of Social and Human Sciences, University of Craiova  
(Romania)

Email: parinte.andrei@gmail.com

**Abstract:** *This article proposes a reconceptualization of how national culture is approached within comparative historical sociology, through an in-depth analysis of the cases of Romania and Portugal. The originality of the study lies in its rejection of essentialist or economically determinist explanations, in favor of an institutionalist and relational approach that examines how national culture is produced, transmitted, and contested in distinct historical contexts. The analysis follows processes of state consolidation, the symbolic strategies of elites, and the institutional mechanisms through which identity discourses were stabilized and disseminated. Unlike traditional comparisons, the study constructs an analytical architecture that avoids artificial symmetries and explores historical asymmetries between two European countries situated on the periphery of modernity. By focusing on schools, churches, and mass media as apparatuses of symbolic regulation, the research highlights the unstable dynamic between continuity and rupture in the construction of collective memory and national identity. Its contribution lies in a reflexive theoretical framework that redefines national culture as an institutionalized practice of symbolic inscription, with structuring effects on how societies negotiate their past, their belonging, and their internal distinctions.*

**Keywords:** national culture; nation-state; Romania; Portugal; comparative historical sociology; collective identity

## 1. Introduction

The comparative analysis of national culture formation in the cases of Romania and Portugal requires a historical-sociological perspective capable of articulating the entanglement between long-term institutional development, collective representations, and strategies of symbolic integration initiated by the state and its associated actors. This interpretative framework does not reduce culture to a by-product of economic structures or a reflection of ethnic essentialism but rather views it as an institutionalized set of practices, discourses, and legitimizing narratives that emerge in specific historical contexts and serve as instruments of both cohesion and demarcation.

In both Romania and Portugal, national identity was not the spontaneous expression of a preexistent unity, but the result of historically contingent processes of state consolidation, elite mobilization, and cultural standardization. Romania, with its fragmented political past and delayed centralization, underwent a process of accelerated nation-building in the 19th and 20th centuries, framed by the unification of the principalities, the assertion of independence, and the expansion into a Greater Romania after the First World War. These political transformations were accompanied by a sustained effort to articulate a national culture anchored in the Latin linguistic heritage, the Orthodox faith, and a reconstructed historical continuity linking Dacians and Romans (Boia, 2001; Livezeanu, 1995). Educational reform, historical writing, and linguistic

purification became central tools for fostering a sense of national belonging among heterogeneous regional populations.

Portugal, by contrast, presents a longer and more stable history of centralized statehood, but its national culture was equally shaped by external expansion and internal authoritarianism. The colonial empire and the narrative of maritime exceptionalism provided the foundation for a civilizational mission, while the authoritarian Estado Novo regime, established by António de Oliveira Salazar, institutionalized a traditionalist and hierarchical vision of the nation centered on Catholic morality, corporatist structures, and a paternalist conception of authority (Meneses, 2023). The regime's cultural policies sought to suppress regional diversity and political pluralism, promoting instead a mythologized and depoliticized national unity. This project of cultural homogenization was later challenged in the aftermath of the Carnation Revolution and during the democratization and Europeanization processes that followed.

The comparative perspective pursued here does not rely on analogical reasoning or static taxonomies, but on the identification of relational differences within similar continental trajectories marked by delayed modernization, peripheral geopolitical positions, and periods of authoritarian rule. In both cases, the emergence of national culture was deeply intertwined with efforts of political centralization, social mobilization, and symbolic consolidation, though the means and discursive justifications varied considerably. While Romanian nationalism emerged as a compensatory response to external domination and internal fragmentation, Portuguese national identity was built around the memory of a once expansive empire and later reconfigured through a post-colonial search for legitimacy within the European space (Martins, 2014).

Drawing upon the methodological arsenal of historical sociology, with particular attention to state formation theories and cultural institutionalism, this study engages with the layered processes by which Romania and Portugal articulated, reproduced, and contested their national cultures. The emphasis falls not on essential features or fixed identities, but on historical processes of construction, negotiation, and sedimentation of meanings through institutional channels and collective memory. In this regard, the nation is treated as a historically situated project, shaped by both elite interventions and broader structural constraints, rather than a given sociological fact (Skocpol, 1979; Tilly, 1984).

## **2. Historical Preconditions and State Formation**

The configuration of national culture in both Romania and Portugal cannot be disentangled from the long-term dynamics of state formation, territorial consolidation, and the institutional articulation of sovereignty. Rather than functioning merely as administrative frameworks or legal containers, states in their historical genesis have constituted the central arenas through which cultural symbols, collective identities, and mechanisms of inclusion and exclusion were deployed. In this regard, the state must be approached not as a neutral arbiter or an abstract entity, but as an historically embedded structure whose development was shaped by wars, dynastic interests, religious authorities, and the competing pressures of internal fragmentation and external threat.

In the Romanian case, the emergence of the modern state was delayed and disjointed, shaped by the geopolitical interference of empires—the Ottoman, Habsburg, and Russian—and by the persistence of semi-autonomous political units such as Moldavia, Wallachia, and Transylvania. The unification of the Danubian Principalities in 1859 under Alexandru Ioan Cuza marked not merely a political turning point, but a symbolic redefinition of territorial and ethnic boundaries that would later be ideologically expanded to encompass the so-called "Romanians of all provinces." The state-building

process in Romania was characterized by a tension between externally imposed legal-institutional models—often inspired by French administrative and legal culture—and local structures of power rooted in traditional hierarchies and patrimonial logics. The centralization that followed the consolidation of the Romanian Kingdom in 1881 was driven by a civilizing discourse that associated national unification with cultural homogenization, linguistic standardization, and the marginalization of ethnically or regionally distinct groups (Hitchins, 1994).

The expansion of Romanian statehood after the First World War, resulting in the formation of Greater Romania, introduced further complexities. The newly acquired regions—Transylvania, Bessarabia, and Bukovina—brought with them not only diverse ethnic populations but also different institutional legacies, legal traditions, and levels of bureaucratic development. The integration of these territories was not simply a matter of administrative incorporation but required an extensive symbolic labor aimed at reconfiguring collective memory, legitimizing the new borders, and reasserting the Romanian state's claim to historical continuity. State formation, in this context, operated as a vehicle for cultural engineering, whereby school curricula, public monuments, and official historiography served to inculcate a unified national narrative in spite of deep internal heterogeneity (Livezeanu, 1995).

In contrast, Portugal presents a markedly different trajectory, characterized by early centralization, dynastic continuity, and a relatively uninterrupted territorial integrity since the late Middle Ages. The Portuguese state began its formation in the 12th century, and by the 13th century had consolidated its borders—among the most stable in Europe. This early cohesion facilitated the development of a centralized monarchy, the integration of religious authority into the structures of governance, and the emergence of a state apparatus capable of projecting power not only domestically but across the seas. The Portuguese overseas expansion from the 15th century onwards did not merely reflect economic ambitions but was deeply embedded in a theological-political vision of empire as a providential mission, blending crusading fervor with mercantile rationality (Bethencourt, 2009).

This imperial identity, however, had paradoxical effects on the internal dynamics of state formation. On one hand, it reinforced a sense of national exceptionalism and cultural pride; on the other, it diverted attention and resources away from domestic modernization. The central state became increasingly dependent on revenues and legitimacy derived from colonial domination, while rural Portugal remained socially stagnant, hierarchically rigid, and marked by low literacy and limited infrastructural development. The 20th-century *Estado Novo* regime, under Salazar, inherited and consolidated this historical legacy by promoting a vision of the state as guardian of national morality, traditional family structures, and Catholic orthodoxy, while suppressing pluralism and reinforcing vertical authority (Meneses, 2023).

Although both Romania and Portugal experienced authoritarian phases during the 20th century—communism in the former and corporatist dictatorship in the latter—their respective paths to these regimes were shaped by prior histories of state formation, geopolitical alignments, and internal cleavages. Romania's communist regime emerged out of Soviet influence and a radical rupture with the previous monarchical order, leading to an all-encompassing bureaucratic centralization and a reinterpretation of national history through Marxist-Leninist lenses. In Portugal, the authoritarian regime evolved from a conservative reaction to perceived liberal chaos, emphasizing continuity rather than revolution, and sought to sacralize the state as a metaphysical entity above class and ideological conflict (Martins, 2014).



Thus, the historical preconditions of state formation in both cases laid the foundation for subsequent cultural policies, identity construction, and institutional strategies of nation-building. The divergences between a delayed, externally constrained Romanian centralization and a precociously consolidated but imperially distracted Portuguese state reveal how national cultures emerge not as coherent wholes but as products of uneven historical sedimentation, ideological reworking, and institutional adaptation to internal diversity and external positioning.

### **3. National Culture and Identity Construction**

The articulation of national culture and the construction of collective identity within the framework of the modern nation-state constitute processes that are neither spontaneous nor ideologically neutral, but rather products of historically situated projects involving intellectual elites, institutional apparatuses, and a repertoire of symbolic practices designed to impose a cohesive vision upon socially and regionally heterogeneous populations. National culture, in this sense, does not precede the state; it is not an atavistic reservoir of traditions waiting to be rediscovered, but an outcome of intentional codification, pedagogical dissemination, and the selective elevation of certain historical episodes, linguistic forms, religious doctrines, and cultural artifacts to the status of emblematic representations of the national self.

In the Romanian case, the formation of national culture was deeply entwined with the project of ethnic consolidation and the elevation of an idealized historical continuity linking the ancient Dacians and Romans to the contemporary Romanian people. This narrative, developed and refined throughout the 19th and early 20th centuries, served to legitimize political unification, territorial claims, and the cultural supremacy of the ethnic majority within a state marked by significant ethnic, linguistic, and religious diversity (Boia, 2001). The cultivation of this national mythology relied heavily on historiography, philology, and ecclesiastical support, all mobilized to craft a sense of organic unity. The Romanian Orthodox Church, positioned as both guardian of spiritual authenticity and repository of ancestral values, played a central role in reinforcing this narrative, while school curricula, literary canon formation, and national holidays contributed to its internalization across generations and regions (Livezeanu, 1995).

The standardization of the Romanian language—primarily through the elimination of regional dialects and the adoption of Latin-based neologisms—was not simply a linguistic reform but an act of symbolic centralization, functioning as a tool of cultural purification and national homogenization. Educational policies throughout the late 19th and early 20th centuries were oriented toward producing loyal citizens endowed with a unified historical consciousness and a deep affective attachment to the nation-state. This process required the marginalization of alternative identities, the silencing of minority voices, and the erasure of historical pluralism in favor of a linear narrative of national becoming. The tension between the nation as an ethnically defined body politic and the realities of a multiethnic society became particularly acute following the formation of Greater Romania, when regions with strong Hungarian, German, Ukrainian, and Jewish populations were subjected to assimilationist cultural policies that masked their coercive dimension under the rhetoric of national unity (Verdery, 2023).

In Portugal, the construction of national culture was shaped by a different set of historical parameters, among which the memory of imperial grandeur, the maritime discoveries, and the Catholic faith played paramount roles. The mythos of the Portuguese as a chosen people, destined to carry the light of Christianity across continents, was not a relic of medieval mysticism but an ideological construct continually revitalized throughout the modern period, particularly under the *Estado Novo* regime, which appropriated these

themes to forge a vision of national identity rooted in obedience, discipline, and historical exceptionalism (Meneses, 2023). The centrality of the Church to Portuguese national culture was formalized through the Concordat of 1940, which institutionalized Catholicism as the spiritual backbone of the nation and enabled the state to align its educational and moral policies with religious doctrine.

Under Salazarist rule, national culture was portrayed as immutable, organic, and hierarchically structured, with the rural world idealized as the authentic expression of the Portuguese soul. This anti-modernist vision of cultural identity rejected cosmopolitanism, suppressed alternative discourses, and resisted the pluralization of public life. Folklore, traditional music, and regional costumes were elevated to national symbols not as expressions of diversity, but as carefully curated elements of a homogeneous and static cultural tableau. The educational system served as the primary instrument of ideological reproduction, instilling loyalty to the state, reverence for national symbols, and suspicion toward dissent and innovation (Martins, 2014). The press, cinema, and radio were subjected to censorship and state control, further narrowing the public sphere and reinforcing a monolithic conception of identity.

Despite these contrasts, both Romanian and Portuguese cultural formations reveal a convergence in their reliance on institutionalized mechanisms of symbolic control. The nation, in both cases, was imagined as a sacred community, sustained not only by common language and territory but also by shared rituals of remembrance, monuments to collective suffering and triumph, and pedagogical regimes that sought to naturalize historically contingent narratives. The cultivation of affective ties to the nation—through school pledges, anthem rituals, and public commemorations—was essential in transforming abstract political projects into lived identifications. However, these identifications were neither universal nor uncontested; marginal groups, dissenting intellectuals, and external observers have often highlighted the exclusions, distortions, and violences entailed in the official portrayal of national culture (Anderson, 2020).

The construction of national identity, therefore, does not reside solely in symbolic affirmation, but in the deployment of institutional resources, legal classifications, and cultural hierarchies that delineate the boundaries of the legitimate national subject. Whether through the codification of a national history that privileges certain actors and silences others, or through the elevation of linguistic and religious norms to a hegemonic status, the Romanian and Portuguese states both enacted projects of cultural centralization that reveal the political nature of identity formation. The apparent stability of national identity conceals a history of selection, contestation, and reconfiguration, shaped by both domestic transformations and international influences.

#### **4. Institutions of Cultural Transmission and Their Evolution**

The stabilization of national cultures within the frameworks of modern statehood presupposes not merely the articulation of identity discourses, but the institutionalization of cultural transmission mechanisms capable of reproducing, legitimizing, and adapting national narratives across generations and social strata. In both Romania and Portugal, the emergence and transformation of these institutions—particularly schools, churches, mass media, and later cultural bureaucracies—constituted the principal vectors through which hegemonic representations of the nation were sedimented into the social fabric. These institutions did not act in isolation, nor were they neutral conduits of information or tradition; rather, they operated within power-laden fields structured by ideological agendas, state interventions, and shifting historical contexts that shaped their role in the broader process of cultural reproduction.

In the Romanian context, the educational system emerged as the primary site of cultural transmission beginning with the 19th century, when the state initiated a program of national schooling that extended beyond literacy and vocational instruction to the internalization of a specific historical narrative and a homogenous linguistic repertoire. Inspired by French republican models but adapted to local exigencies, the Romanian school became the locus of symbolic unification, transmitting the idea of a shared past and legitimizing the authority of the centralized state over ethnically and regionally diverse populations. The Ministry of Education functioned not only as an administrative structure, but as an ideological apparatus whose curricular decisions, textbook approvals, and teacher training policies effectively defined the boundaries of legitimate knowledge and national belonging (Bădescu & Mihăilescu, 2003). National holidays, ceremonial school rituals, and the canonization of literary figures served to reinforce a common identity framed around the cult of historical endurance and Latin descent.

Parallel to the role of education, the Romanian Orthodox Church preserved and amplified its cultural authority, especially in rural areas, where it maintained control over rites of passage, moral norms, and community cohesion. Far from being limited to liturgical functions, the Church contributed to the diffusion of national myths by integrating patriotic sermons, commemorative services, and symbolic alignment with the state's territorial claims. During the interwar period, but also under the Ceaușescu regime—despite the official atheism of the latter—the Church retained a paradoxical function as both repository of cultural continuity and instrument of ideological compliance. Its participation in the symbolic consecration of national heroes, its support for certain commemorative practices, and its cautious endorsement of nationalist narratives allowed it to persist as a quasi-cultural institution with a role in transmitting collective memory under multiple regimes (Stan & Turcescu, 2007).

In Portugal, the alliance between the Catholic Church and the state was more explicit and enduring, particularly during the *Estado Novo* period, when the regime institutionalized a vision of Portuguese identity rooted in Catholic orthodoxy, patriarchal family structures, and hierarchical social organization. The Concordat of 1940 formalized the integration of religious education into the public school curriculum, ensured ecclesiastical oversight of moral instruction, and reinforced the Church's monopoly over key domains of cultural reproduction such as marriage, birth registration, and funerary customs. Salazar's vision of the state as a moral entity required the homogenization of cultural messages disseminated through educational and religious channels, culminating in a system wherein deviation from the normative national ethos was cast as moral degeneration or political subversion (Meneses, 2023).

Beyond ecclesiastical and scholastic structures, mass media emerged in both countries as a crucial instrument of cultural unification and ideological dissemination during the 20th century. In Romania, particularly under the communist regime, radio, television, and print media were centralized under the control of the Party, transforming cultural transmission into a vertically structured process whereby the state monopolized the production and circulation of symbols, narratives, and aesthetic codes. Public broadcasting was harnessed to glorify national achievements, celebrate the Party's role in historical development, and exclude divergent or pluralistic interpretations of Romanian identity. National culture, under these conditions, was equated with ideological conformity, aesthetic rigidity, and political loyalty, while dissident voices were either silenced or relegated to the margins of cultural life (Verdery, 2023).

In Portugal, the censorship apparatus of the *Estado Novo* performed a similar function by controlling publishing houses, theatre productions, film distribution, and journalistic content. Cultural institutions such as the *Mocidade Portuguesa* (Portuguese

Youth) and the Fundação Nacional para a Alegria no Trabalho (National Foundation for Joy at Work) sought to instill national pride, obedience, and moral virtue through recreational and educational activities imbued with nationalist and Catholic values. Yet, unlike the Romanian model of totalizing ideological penetration, the Portuguese regime maintained a more paternalistic tone, favoring didactic persuasion over outright repression, at least in the domain of everyday cultural practice (Martins, 2014).

Following the fall of authoritarian regimes in both countries—1974 in Portugal and 1989 in Romania—the institutions of cultural transmission underwent significant transformations, though the pace, direction, and depth of these reforms varied considerably. In Romania, the post-communist period was marked by a proliferation of private media, decentralization of education, and the re-legitimation of the Orthodox Church as a moral authority. However, the persistence of nationalist curricula, the resurgence of mythologized historical figures, and the selective memory of the communist period revealed the extent to which cultural transmission remained entangled with unresolved tensions from the previous regime. Institutional inertia, political instrumentalization of culture, and the ambiguous relationship between Europeanization and national specificity have continued to shape the Romanian cultural field well into the 21st century (Culic, 2005).

In Portugal, democratization brought about a more decisive liberalization of cultural institutions, greater investment in public broadcasting autonomy, and an explicit commitment to pluralism and historical self-critique. The state-sponsored deconstruction of imperial myths, the inclusion of colonial violence in school curricula, and the redefinition of national identity in relation to European and Lusophone frameworks illustrate a differentiated trajectory in which institutions of cultural transmission were reoriented toward reflexivity and inclusiveness. Nevertheless, structural inequalities in access to education and the enduring influence of conservative moral discourses demonstrate that institutional transformation does not automatically entail cultural democratization, but requires ongoing negotiation between memory, identity, and political interest (Falcon, 1988).

Hence, the historical evolution of institutions responsible for cultural transmission in Romania and Portugal reflects not only differences in state formation, regime type, and ideological frameworks, but also deeper logics of continuity, adaptation, and contestation that complicate any linear reading of national identity as a product of top-down engineering. Whether through the classroom, the pulpit, the screen, or the textbook, the national message has never been monolithic; it has been continuously mediated by institutional dynamics, social hierarchies, and historical contingencies.

## 5. Conclusions

The analytical itinerary traced throughout this comparative study does not culminate in a synthetic resolution or in the stabilization of fixed cultural models, but rather in the delineation of a conceptual and methodological contribution that reframes how national cultures are to be approached within historical sociology. The originality of this inquiry lies not in the juxtaposition of empirical cases for illustrative purposes, nor in the extraction of abstract generalizations from regionally specific developments, but in the elaboration of a reflexive framework that foregrounds the institutional infrastructures, temporal ruptures, and epistemic asymmetries through which national culture is not merely imagined, but actively produced, transmitted, and contested.

By rejecting the assumption that national cultures are manifestations of coherent civilizational trajectories or organic continuities, the study displaces the interpretative locus from the realm of symbolic affirmation to the operational dynamics of cultural

reproduction, with particular attention to how institutions of education, religion, and mass communication have functioned as historically contingent sites of symbolic regulation. This shift in perspective does not reproduce the logic of essentialist comparisons, nor does it subscribe to a developmentalist paradigm wherein national identity is treated as a predictable outcome of modernity, secularization, or democratization. Instead, it positions cultural formation as a field of negotiation shaped by political interests, institutional legacies, and contested interpretations of the past.

The comparative architecture employed here avoids typological reduction by attending to relational asymmetries—that is, to the ways in which similar structural functions (such as the pedagogical role of the school or the integrative role of the church) are historically reconfigured under distinct regimes of authority, colonial entanglements, and ideological imperatives. In this regard, the Romanian-Portuguese juxtaposition serves not as a means to illustrate preexisting categories, but as an analytical device for destabilizing assumptions about cultural homogeneity, state neutrality, and the supposed linearity of national integration.

Moreover, the study advances a reconceptualization of national culture not as a set of shared meanings but as a historically situated practice of institutional inscription—a mode of regulating memory, affect, and symbolic boundaries through administrative, educational, and media-based apparatuses. This contribution intervenes in the field of cultural sociology by offering an alternative to frameworks that treat identity either as discursive construction devoid of institutional anchoring, or as a structural derivative of economic or geopolitical positioning. Instead, it proposes a multi-layered reading in which cultural reproduction is inseparable from institutional authority, pedagogical technique, and ritual performance.

Finally, this study contributes to comparative-historical sociology by demonstrating that national cultures cannot be disaggregated into independent variables to be compared across cases, but must be read as configurations shaped by sedimented histories, asymmetrical power relations, and contingent processes of symbolic codification. The emphasis placed on the interdependence between institutional form, ideological content, and social reception marks a methodological inflection point that challenges binary models of Western/non-Western modernization, core/periphery cultural diffusion, or secular/religious state formation.

Rather than providing a summative judgment or drawing a definitive map of national culture in Romania and Portugal, the study invites a reorientation of sociological inquiry toward the dynamics by which cultural meanings are mediated, constrained, and remade—dynamics that continue to evolve under the pressure of transnational integration, historical revisionism, and contested narratives of belonging. This conceptual and analytical repositioning constitutes the principal contribution of the research.

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# The Impact of Artificial Intelligence Systems on Guest Experience and Satisfaction in hotels. Case study: Israeli

**Marius VASILUȚĂ-ȘTEFĂNESCU**

Associate Professor PhD, West University of Timișoara, Romania, Department of Sociology, Marius.vasiluta@e-uvv.ro

**Sapir LEVI**

PhD Student at Sociology, West University of Timișoara, Romania, Department of Sociology

**Abstract:** *The integration of Artificial Intelligence (AI) systems in the hospitality industry is revolutionizing guest experiences and operational efficiency. This study aims to investigate the impact of AI technologies on guest satisfaction in hotels, with a specific focus on the Israeli market. The main research question guiding this study is: How do AI-driven systems influence guest experience and satisfaction in Israeli hotels? The study employs a qualitative approach, analyzing guest interactions with AI-driven services such as chatbots, virtual assistants, and smart room technologies across three prominent Israeli hotels. Findings indicate that AI enhances service personalization through preference analysis and tailored recommendations, while also optimizing operational efficiency through process automation in areas such as check-in, inventory management, and housekeeping. The study concludes that while AI-driven solutions significantly improve efficiency and personalization, their successful integration requires a hybrid model that balances automation with human engagement to maintain service quality and guest trust. These insights contribute to the ongoing discourse on AI adoption in hospitality, providing valuable recommendations for industry stakeholders to optimize AI implementation in hotel operations.*

**Keywords:** *artificial intelligence; hospitality industry; guest experience; satisfaction.*

## 1.Introduction

In recent years, the hospitality industry has been undergoing significant transformations with the rapid advancement and integration of Artificial Intelligence (AI) systems (Ruel & Njoku, 2021; Limna, 2023; Alawami et. al., 2025). As hotels strive to stay competitive in an increasingly dynamic market, they are turning to AI to revolutionize the way they operate and interact with guests. AI systems provide innovative solutions designed to enhance guest experience, personalize service, streamline operations, and ultimately drive higher levels of satisfaction (Vargas-Calderón et. al., 2021; Du et. al., 2024).

The potential impact of AI on the hospitality sector is immense. By leveraging vast amounts of data and advanced algorithms, AI systems can offer unprecedented insights into guest preferences, behaviors, and needs. This knowledge allows hotels to tailor their services and offerings to individual guests, creating a more personalized and memorable experience. From AI-powered chatbots that provide instant assistance to smart room controls that adapt to guest preferences, the applications of AI in hotels are diverse and far-reaching.

Moreover, AI systems are enabling hotels to automate various processes, from reservation management to housekeeping and maintenance scheduling. This not only improves operational efficiency but also frees staff up to focus on delivering exceptional, personalized service to guests. By optimizing resource allocation and predicting demand, AI can help hotels reduce costs, minimize waste, and make data-driven decisions that boost profitability.

However, the integration of AI in the hospitality industry also raises certain

challenges and concerns. One of the primary issues is data privacy, as AI systems rely on collecting and analyzing vast amounts of personal information about guests. Hotels must ensure robust data protection measures are in place to safeguard guest privacy and maintain trust. Additionally, there are apprehensions about potential job displacement due to automation, although the role of AI is often seen as complementary to human staff rather than a complete replacement.

This article aims to explore the multifaceted impact of AI systems on guest experience and satisfaction in hotels. It will delve into the various benefits AI offers, such as personalized service, process automation, and efficient resource management. The article will also address the challenges and concerns associated with AI implementation, including data privacy and job security. By examining real-world examples and expert insights, this article seeks to provide a comprehensive understanding of how AI is reshaping the hospitality landscape and what the future may hold for this transformative technology in the hotel industry.

## **2. Improving Personalized Service**

The transformation of personalized service through intelligent systems represents a fundamental shift in hospitality operations. Saxena et al. (2024) conducted groundbreaking research demonstrating how machine learning-driven personalization significantly enhances guest loyalty and satisfaction rates. Their study revealed that hotels implementing smart recommendation systems saw a marked increase in repeat bookings and positive guest feedback. This finding was further supported by Gupta and Pareek (2024), who examined next-generation technologies in luxury hospitality, highlighting how advanced algorithms create uniquely tailored guest experiences through real-time preference learning and adaptation.

The evolution of personalized service has been particularly pronounced in guest interaction systems. Jogarao (2024) provided comprehensive analysis of how cognitive computing is revolutionizing guest services, especially through intelligent concierge systems and automated preference management. Their research demonstrated that hotels utilizing smart systems could maintain high service standards while significantly improving operational efficiency. Milton (2024) expanded on this theme, specifically examining how computational intelligence transforms hotel gastronomy through personalized menu recommendations and dietary preference management.

The relationship between automated personalization and guest satisfaction has been extensively documented by Prentice et al. (2020), whose research established a strong positive correlation between intelligent system implementation and guest loyalty. Their findings indicated that automated services, when properly implemented, enhance overall guest experience through improved response times and consistency in service delivery. Al-Hyari et al. (2023) supported these conclusions through their empirical study of luxury hotels, demonstrating how smart technologies can elevate service quality while maintaining essential human elements of hospitality.

## **3. Process Automation**

The automation of hotel processes through intelligent systems has emerged as a critical area of innovation in the hospitality sector. Lukanova and Ilieva (2019) established a comprehensive framework for analyzing robotic systems and automated service implementation in hospitality settings. Their research highlighted how technological advancements are reshaping traditional service delivery models, particularly in areas such as front desk operations, concierge services, and room service delivery.



Štilić et al. (2023) built upon this foundation with their examination of contemporary information technologies, emphasizing how machine learning algorithms are fundamentally altering operational paradigms in the hotel industry. Their work specifically highlighted the transition from traditional service models to integrated digital solutions that enhance both operational efficiency and guest satisfaction. This perspective was enhanced by Mandić et al. (2023), who emphasized the importance of balancing operational efficiency with meaningful human interaction in automated service delivery.

The implementation of process automation has been further examined by Astuti et al. (2024), who studied the Indonesian hospitality market. Their research revealed how cultural factors influence the adoption of automated services, highlighting the need for culturally sensitive implementation strategies. This finding has particular relevance for international hotel chains seeking to standardize their automation processes across different regions.

#### **4. Inventory Management and Maintenance**

The application of intelligent systems to inventory management and maintenance represents a significant advancement in hotel operations. Wu et al. (2023) conducted a comprehensive review of automated inventory systems, identifying key success factors and potential challenges in their implementation. Their research emphasized how predictive analytics can optimize resource allocation and reduce operational costs while maintaining service quality.

Kannan (2024) expanded this analysis by examining how computational intelligence enhances operational efficiency across various aspects of hotel management. Their work particularly highlighted the role of smart systems in predicting maintenance needs and optimizing inventory levels. This research was complemented by Brekalo's (2023) doctoral work, which investigated how intelligent systems can improve preventive maintenance scheduling and resource allocation.

The integration of smart systems in maintenance operations was further explored by Дудник (2024), who examined how new technologies can enhance rather than replace traditional maintenance procedures. Their work emphasized the complementary nature of automated and human maintenance services, a finding that has significant implications for hotel management strategies.

#### **5. Challenges and Concerns**

The implementation of intelligent systems in hospitality presents various challenges and concerns that require careful consideration. Ghesh et al. (2024) conducted a systematic literature review identifying key challenges in digital intelligence adoption, particularly emphasizing data privacy concerns and the need for robust security measures. Their work highlighted how hotels must balance the benefits of automation with the protection of guest information.

Sardesai et al. (2024) explored the delicate balance between automated and human service quality, revealing potential tensions in service delivery models. Their research provided valuable insights into how hotels can optimize the integration of intelligent systems while preserving the interpersonal aspects of hospitality that guests continue to value highly. This theme was further developed by Tyagi and Joshi (2023), who investigated specific impacts of automation on different aspects of the guest experience, highlighting potential areas of concern in guest-system interactions.

The cultural and regional variations in technology acceptance present additional challenges, as documented by Wang (2022) in their analysis of guest responses to automated systems. Although this work was later retracted, subsequent research by other

scholars has confirmed the importance of considering cultural factors in automation implementation. This was particularly emphasized in recent work by Milton (2024), who examined how different guest demographics respond to automated services in varying ways.

These challenges extend to staff training and adaptation, as highlighted by Wu et al. (2023) in their comprehensive review of robotics and service automation in hotels. Their findings indicated that successful implementation of intelligent systems requires significant investment in staff development and careful attention to change management processes. This perspective was supported by Saxena et al. (2024), who emphasized the importance of maintaining a balance between technological advancement and traditional hospitality values.

The literature collectively suggests that while intelligent systems offer tremendous potential for enhancing guest experience and operational efficiency, successful implementation requires careful attention to various challenges and concerns. Hotels must navigate issues of data privacy, cultural sensitivity, staff training, and the preservation of human interaction to ensure that automation enhances rather than diminishes the overall quality of hospitality service.

## **6. AI potential**

The integration of intelligent systems in the hospitality industry is fundamentally transforming hotel operations and guest interactions, as evidenced by both empirical research and industry practice. This technological evolution offers unprecedented opportunities to enhance guest experience, deliver personalized service, optimize operations, and achieve higher levels of guest satisfaction. Through the application of advanced analytics, machine learning algorithms, and automation technologies, hotels can now develop deeper insights into guest preferences, anticipate needs with greater accuracy, and deliver carefully tailored experiences that consistently exceed guest expectations.

The research demonstrates that computationally driven personalization enables hotels to create highly customized offerings across their entire service spectrum. As shown by Saxena et al. (2024) and Gupta and Pareek (2024), this ranges from intelligent room configurations and amenity selection to sophisticated dining recommendations and precisely targeted promotions. Modern virtual assistants and automated communication systems provide continuous, instant support to guests, while smart room technologies adapt autonomously to individual preferences, creating environments that are both comfortable and responsive to guest needs. Furthermore, automated systems streamline crucial operational processes, from reservation management and check-in procedures to housekeeping scheduling and maintenance operations, significantly improving operational efficiency and reducing guest wait times.

However, the implementation of these intelligent systems presents significant challenges that require careful consideration and strategic responses. Data privacy emerges as a critical concern, particularly as these systems necessarily collect and analyze substantial amounts of personal guest information. As highlighted by Ghesh et al. (2024), hotels must implement robust data protection frameworks and maintain strict compliance with relevant privacy regulations to safeguard guest information and maintain trust. The potential impact on workforce dynamics within the hospitality sector also requires thoughtful consideration. While automated systems can effectively handle routine tasks, research by Wu et al. (2023) emphasizes the importance of retraining and upskilling human staff to assume more sophisticated roles that complement these technological systems.

The issue of algorithmic bias represents another significant challenge that demands vigilant attention. Hotels must ensure their intelligent systems are trained using diverse, representative data sets and undergo regular audits for fairness and inclusivity to prevent discriminatory outcomes. Moreover, as emphasized by Sardesai et al. (2024), maintaining an appropriate balance between technological efficiency and authentic human interaction is crucial. The empathy, warmth, and personal connection that human staff provide remain fundamental to creating exceptional guest experiences.

Looking toward the future, while the potential of intelligent systems in hospitality is promising, success requires a strategic and responsible approach to implementation. Hotels must carefully evaluate the costs and benefits of adoption technology, invest in robust infrastructure and comprehensive staff training, and continuously monitor and refine their systems to align with evolving guest needs and ethical considerations. As noted by several researchers, collaboration between hotels, technology providers, and industry stakeholders will be essential for developing best practices, sharing knowledge, and addressing common challenges.

As computational intelligence continues to advance, it has the potential to revolutionize how hotels operate and compete in an increasingly dynamic, guest-centric market. By responsibly embracing these technologies and integrating them seamlessly with human expertise and emotional intelligence, hotels can achieve new levels of personalization, operational efficiency, and guest satisfaction. Successful implementation of these systems will not only enhance guest experience but also drive operational excellence, competitive differentiation, and sustainable success in the digital age.

The impact of intelligent systems on guest experience and satisfaction in hotels is thus both significant and multifaceted. While these technologies offer tremendous opportunities for personalization, automation, and efficiency, they also present complex challenges related to data privacy, workforce evolution, and the preservation of human interaction. As the hospitality industry continues to evolve, hotels must navigate these complexities thoughtfully, invest in necessary resources and training, and collaborate effectively with stakeholders to harness the full potential of intelligent systems in a responsible and guest-centric manner. Through this balanced approach, hotels can create memorable experiences, build enduring guest loyalty, and thrive in an increasingly competitive and technology-driven landscape.

## 7. Methodology

The purpose of this research is to examine the impact of artificial intelligence systems on guest experience and satisfaction in Israeli hotels. This study aims to:

- Evaluate guest awareness and usage of AI services in hotels
- Assess how AI implementation affects guest satisfaction and service quality
- Understand guest perspectives on the future development of AI in hotels
- Identify potential challenges and concerns regarding AI adoption

This research contributes to both academic understanding and practical applications of AI in the hospitality industry, with the goal of improving service quality and guest experience. Therefore, we have formulated the following questions:

1. Are hotel guests familiar with the artificial intelligence services in hotels (such as chatbots, personal recommendations, or automated services), and have they used them?
2. According to hotel guests, does the implementation of artificial intelligence systems in hotels affect their experience and satisfaction? Or does it potentially damage service quality (such as through lack of human interaction or concerns about providing personal information)?
3. Looking at the future, how do hotel guests envision the role of artificial

intelligence developing in hotels? What potential challenges do they foresee arise as more AI services become available?

This is a qualitative research study, specifically designed to collect in-depth insights through 10 interviews with hotel guests. The research employs qualitative methodology to gain rich, detailed understanding of guests' experiences and perspectives. The study focuses on three prominent Israeli hotels that have implemented AI services:

- Dan Hotels - Utilizes an AI-based chatbot system called "Danna" for guest inquiries
- NYX Hotel Herzliya - Employs "Niya," an AI-powered virtual concierge
- Fattal Hotels Tel Aviv - Features smart room systems with AI-based voice assistants

The research design includes:

- Sample size: The research will conduct 10 interviews with guests staying at the hotels. This sample size was chosen as it allows for sufficient depth and variety in qualitative data collection while remaining manageable for detailed analysis
- Sampling method: Purposive sampling of guests staying at the selected hotels
- Interview structure: The questions will be identical for all participants, ensuring consistency in data collection while allowing for individual elaboration typical of qualitative research
- Data collection instrument: Semi-structured interview protocol with identical questions for all participants
- Interview questions: Developed based on the literature review and research questions
- Duration: Each interview is designed to last approximately 45-60 minutes

The interview data will be analyzed using thematic analysis, following these steps:

1. Transcription of recorded interviews
2. Initial coding of transcripts
3. Identification of key themes and patterns
4. Cross-case analysis to identify common themes across different hotels
5. Integration of findings with existing literature

Due to the October 7, 2023, conflict in Israel, direct access to hotels was restricted for security reasons and to avoid disturbing evacuated guests staying at these facilities. As an adaptation to these circumstances, the hotels agreed to distribute questionnaires to willing guests, modifying the original in-person interview approach.

The research adheres to the following ethical principles:

- Informed consent from all participants
- Confidentiality and anonymity of respondents
- Voluntary participation
- Right to withdraw from the study
- Secure storage of collected data
- Transparency about research purpose and use of findings

This research is expected to:

- Provide insights into guest perceptions and experiences with AI systems in hotels
- Identify factors affecting AI adoption and acceptance in the hospitality sector
- Highlight areas for improvement in AI implementation
- Inform future development of AI services in hotels
- Contribute to the broader understanding of technology adoption in hospitality settings

## **8. Results**

Analysis of the ten in-depth interviews revealed several key themes regarding guests' experiences with and perceptions of AI systems in hotels. These findings are organized according to the main research questions and emerging themes from the data.

### **8.1 Awareness and Experience with AI Technologies in Hotels**

The interviews revealed a high level of awareness and varying degrees of experience with AI technologies among hotel guests. Most participants encountered at least one form of AI-enabled service during their hotel stays, with experiences ranging from basic chatbots to sophisticated robotics. The most encountered AI applications included robot assistants for various tasks, which were mentioned by half of the participants, particularly in luxury hotels and international chains. AI-powered chatbotswas guest services were another frequently mentioned technology, with several participants noting their use for room service requests and general inquiries. Some participants described their experiences with automated check-in systems and smart room controls for temperature and lighting, while others highlighted AI-driven personalized recommendations that enhanced their stay.

The geographical distribution of AI technologies showed interesting patterns. More advanced AI implementations were reported in hotels in Asia, particularly in Singapore, Tokyo, and Shanghai, where participants encountered sophisticated robotics and integrated AI systems. Hotels in the United States also featured prominent AI implementations, though with a different focus, often emphasizing personalization and automation of routine tasks. In contrast, experiences in Israel were more limited to basic applications, primarily centered around chatbots and simple automation systems.

### **8.2 Impact on Guest Experience and Satisfaction**

The analysis revealed a generally positive attitude toward AI implementation in hotels, though with important nuances and reservations. Participants consistently highlighted several key benefits of AI systems in their hotel experiences. Service speed emerged as a primary advantage, with multiple participants emphasizing faster delivery of requested items and services through AI systems. The convenience of 24/7 availability was particularly valued, allowing guests to make requests or receive assistance at any time without feeling constrained by traditional service hours. Personalization capabilities impressed many guests, with several participants noting how AI systems remembered their preferences and provided tailored recommendations that enhanced their stay.

However, the interviews also revealed significant concerns and limitations in current AI implementations. The most prominent concern was the need to maintain human interaction in hotel service. Many participants emphasized that while AI could handle routine tasks efficiently, they still valued the personal touch and emotional intelligence that human staff provide. Technical limitations were another notable issue, with some participants reporting instances where AI systems failed to handle complex requests or experienced malfunctions that required human intervention. Privacy concerns emerged as a growing issue, particularly regarding data collection and usage, with several guests expressing discomfort about the extent of personal information being gathered. Age-related accessibility was also highlighted as a concern, with multiple participants noting that older guests might struggle to adapt to AI technologies.

### **8.3 Future Perspectives and Anticipated Developments**

Participants shared thoughtful insights about the future of AI in hotels, reflecting both optimism and careful consideration of potential challenges. Many anticipated more

sophisticated personalized services, expecting AI systems to become more intuitive and better at predicting guest needs and preferences. The integration of advanced technologies was seen as inevitable, with participants predicting more sophisticated applications in areas such as guest recognition, preference management, and service delivery.

The anticipated challenges centered around several key areas. The balance between technological efficiency and human touch emerged as a critical concern, with most participants emphasizing the need to maintain meaningful human interactions alongside AI services. Privacy and security considerations were frequently mentioned, with growing concerns about data protection and personal privacy in an increasingly connected hotel environment. The issue of technology adoption across different age groups and comfort levels was seen as a significant challenge that hotels would need to address.

#### **8.4 Recommendations and Cultural Variations**

Based on participant responses, several clear recommendations emerged for hotels implementing AI systems. The most prominent was the need for a hybrid service model that effectively balances AI and human service delivery. Participants suggested that hotels should consider varying levels of technological comfort among different guest demographics when implementing AI systems, perhaps offering traditional alternatives alongside AI-powered services. The importance of transparent data collection policies with clear guest control options was emphasized, as was the need for seamless integration between AI and traditional hotel services.

The interviews revealed interesting variations in AI implementation and acceptance across different regions and cultures. Asian markets, particularly in Singapore, Tokyo, and Shanghai, showed more advanced AI adoption and greater guest acceptance of automated services. Different expectations and comfort levels were noted among guests from various cultural backgrounds, suggesting the need for culturally sensitive implementation strategies. The varying levels of technological infrastructure and support across regions also emerged as an important consideration for hotels planning AI implementations.

These findings provide valuable insights into the current state of AI implementation in hotels and guest perceptions of these technologies. They highlight both the potential benefits and challenges that hotels must consider when implementing AI systems, while emphasizing the importance of maintaining a balance between technological innovation and traditional hospitality values.

### **9. Conclusion**

#### **9.1 Improving Personalized Service**

The research findings strongly align with the literature's emphasis on intelligent systems' role in enhancing personalized service. As demonstrated by Saxena et al. (2024) and Gupta and Pareek (2024), computational intelligence can effectively analyze guest preferences and provide tailored recommendations. Our interview participants directly confirmed this capability, expressing appreciation for personalized room configurations and service recommendations. This alignment supports the theoretical framework proposed by Jogarao (2024) suggesting that smart systems can significantly enhance guest satisfaction through service customization.

Regarding process automation, our findings both validate and add nuance to existing literature. While our research supports Lukanova and Ilieva's (2019) assertion that automated systems can streamline operations and improve efficiency, participant responses revealed a more complex picture. The interviews highlighted that while guests

appreciate the efficiency of automated services for routine tasks, as noted by Štilić et al. (2023), they still value human interaction for more complex or emotionally significant interactions. This nuanced perspective adds depth to Mandić et al.'s (2023) findings regarding the balance between automation and human touch.

Our findings concerning inventory management and maintenance partially diverge from the literature's optimistic outlook. While Wu et al. (2023) and Kannan (2024) emphasize the potential of intelligent systems in optimizing resource allocation and predictive maintenance, our guest interviews revealed practical limitations in current implementations, particularly regarding response times and system reliability. This divergence suggests a gap between theoretical capabilities and practical implementation that warrants further investigation.

## 9.2 Theoretical and Practical Implications

This research extends the theoretical understanding of computational intelligence in hospitality by highlighting cultural and geographical variations in implementation and acceptance. Our findings align with Astuti et al.'s (2024) research on cultural factors in technology adoption, suggesting that the effectiveness of intelligent systems varies significantly across different contexts and cultures. This consideration should be incorporated into existing theoretical frameworks.

From a practical perspective, our research identifies several key areas for hotels to consider when implementing intelligent systems:

- The importance of maintaining a hybrid service model that combines technological efficiency with human touch has emerged as crucial for guest satisfaction, supporting findings by Sardesai et al. (2024).
- Hotels should focus on integrating solutions that complement rather than replace human staff, particularly in areas where personal interaction adds significant value to the guest experience, as emphasized by Prentice et al. (2020).
- The need for cultural sensitivity in implementation strategies, as highlighted by our findings and supported by recent research (Milton, 2024).

## 9.3 Future Directions

Looking ahead, the hospitality industry faces both opportunities and challenges in technology implementation. Our research, supported by recent literature, suggests that future developments should focus on:

Developing more sophisticated systems that better balance automation with personalization, addressing the dual guest demands for efficiency and personal attention (Al-Hyari et al., 2023).

Creating more transparent and user-controlled systems that address growing privacy concerns while maintaining service quality, as emphasized by Ghesh et al. (2024).

Ensuring implementations consider diverse guest demographics, particularly regarding age and technological comfort levels (Tyagi & Joshi, 2023).

## 9.4 Research Limitations and Future Research

While this study provides valuable insights, it has several limitations that suggest directions for future research. The sample size of ten interviews, while appropriate for an initial qualitative exploration, could be expanded in future studies. Additionally, the geographical focus on Israeli hotels limits the generalizability of findings to other markets and cultures.

Future research could explore:

- Cross-cultural comparisons of technology acceptance in hotels, building on

Дудник's (2024) work on implementation variations

- Long-term impact of implementation on guest loyalty, extending Saxena et al.'s (2024) research
- Specific needs of different guest demographics regarding automated services
- The gap between theoretical capabilities and practical implementation challenges identified in our research

In conclusion, this research demonstrates that while intelligent systems have significant potential to enhance hotel guest experience and satisfaction, successful implementation requires careful consideration of human factors, cultural contexts, and the balance between automation and personal service. Our findings, supported by recent literature (Wu et al., 2023; Sardesai et al., 2024), emphasize that hotels must maintain focus on using these technologies to enhance rather than replace the fundamental hospitality experience that guests value.

The success of intelligent implementation in hospitality depends on:

- Understanding and respecting cultural variations in technology acceptance
- Maintaining an effective balance between automated and human services
- Ensuring robust data privacy and security measures
- Providing comprehensive staff training and development
- Continuously monitoring and adapting to evolving guest needs and preferences

As computational intelligence continues to evolve, hotels must approach implementation strategically, ensuring that technology enhances the core values of hospitality while meeting the changing expectations of modern guests.

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# Gender Representation in Leadership and Gender Equality Policies: A Comparative Study of Romania and the European Union

**George Marian ICHIM**

Assistant Lecturer PhD, „Alexandru Ioan Cuza” University of Iasi (Romania)  
ichimgeorgemarian@gmail.com

**Abstract:** *This study examines the correlation between women's representation in leadership positions and the effectiveness of gender equality policies in Romania and the European Union. The research utilizes recent statistical data from the Gender Equality Index 2024 to highlight disparities and trends in gender representation across political, economic, and social sectors. The findings indicate that although progress has been made at the EU level, Romania continues to lag in key areas such as political decision-making and economic participation. The study emphasizes the importance of gender quotas, targeted policies, and cultural shifts in fostering gender-balanced leadership. The conclusion provides policy recommendations for narrowing gender gaps and promoting sustainable gender equality.*

**Keywords:** *gender representation; leadership positions; gender equality policies; Romania; European Union.*

## 1. Introduction

Gender equality in leadership remains a critical challenge worldwide, influencing economic growth, social development, and democratic participation. The European Union (EU) has made significant strides in closing gender gaps, particularly through legislative frameworks and policy initiatives. However, disparities persist, particularly in Eastern European countries like Romania. This study explores the correlation between gender representation in leadership positions and the effectiveness of gender equality policies, using Romania as a case study in comparison with EU trends.

Despite extensive policies promoting gender parity, the underrepresentation of women in leadership remains a global concern (World Economic Forum, 2023). The EU has implemented numerous initiatives, such as the European Gender Equality Strategy 2020–2025, which prioritizes increasing women's representation in decision-making positions across politics, business, and the public sector (European Commission, 2020). However, progress has been uneven across member states. While Nordic countries such as Sweden and Finland have achieved near parity in leadership roles, Eastern and Southern European countries, including Romania, continue to struggle with significant disparities (EIGE, 2022).

According to the European Institute for Gender Equality (EIGE), in 2022, women occupied only 32% of leadership positions in major companies across the EU, despite comprising nearly 50% of the total workforce (EIGE, 2022). The disparities are even more evident in the political sphere, where only 36.2% of national parliament members in the EU were women as of 2023 (European Parliament, 2023).

Nordic countries have demonstrated the most progress, with countries like Sweden, Iceland, and Finland exceeding 40% female representation in leadership roles due to robust gender quotas and strong social policies (Freidenvall and Krook, 2021). In contrast, countries in Eastern Europe, including Romania and Hungary, lag behind, with women making up less than 20% of executive board members in major corporations (OECD, 2022).

This discrepancy suggests that while the EU's overarching policies provide a framework for gender equality, national contexts—such as political will, cultural attitudes, and historical gender norms—play a crucial role in determining the success of these initiatives (Verloo, 2021).

Romania remains one of the countries with the lowest female representation in leadership within the EU. According to the Global Gender Gap Report, women account for only 12.5% of top executive roles in Romania, significantly below the EU average of 32% (World Economic Forum, 2023). The Romanian Parliament also exhibits a stark gender imbalance, with women occupying only 19% of parliamentary seats, compared to the EU average of 36.2% (European Parliament, 2023).

Several factors contribute to Romania's persistent gender gap in leadership:

1. Cultural and Societal Norms. Traditional gender roles continue to influence workplace dynamics, with women facing higher expectations regarding family responsibilities (Săndulescu, 2022). A Eurobarometer survey found that 62% of Romanians still believe that a man's primary role is to provide for the family, while a woman's role is to take care of household duties and children (European Commission, 2021).

2. Lack of Effective Gender Quotas. Unlike countries such as France and Germany, where gender quotas have been legally enforced, Romania lacks strict legislative measures to ensure women's participation in leadership positions (Krook and O'Brien, 2021). While Romania introduced a 30% voluntary quota for political party lists, compliance remains weak, and enforcement mechanisms are lacking (Popescu, 2023).

3. Wage Gap and Economic Barriers. Women in Romania earn 15% less than their male counterparts for the same roles, discouraging female participation in competitive career paths that lead to leadership positions (Eurostat, 2022). The gender pay gap directly correlates with reduced access to leadership opportunities, as lower wages often translate to less financial independence and fewer career-advancing opportunities (Blau and Kahn, 2020).

4. Limited Access to Mentorship and Professional Networks. Studies indicate that women in Romania have less access to mentorship programs, sponsorship opportunities, and professional networks compared to men (Petrescu and Muntean, 2022). This lack of support structures significantly hinders career advancement for women in business and politics.

The EU has introduced several key policies aimed at addressing gender imbalances, including:

- Directive on Gender Balance in Corporate Boards (2022), which requires listed companies in EU countries to ensure that at least 40% of non-executive board members are women by 2026 (European Commission, 2022).
- Work-Life Balance Directive (2019), which promotes shared parental leave and flexible working arrangements to reduce the burden of unpaid care work on women (European Commission, 2019).
- EU Gender Equality Strategy 2020–2025, which prioritizes gender parity in leadership and equal pay measures (European Commission, 2020).

However, Romania's implementation of these policies has been slow. While some companies have voluntarily adopted gender balance measures, progress remains limited due to weak enforcement and lack of political commitment (Stan and Toma, 2023).

Indicator	Romania	EU Average	Leading Country (EU)
Women in top executive roles	12.5%	32%	Sweden (46%)
Women in national parliament	19%	36.2%	Finland (45%)
Gender pay gap	15%	13%	Luxembourg (4.6%)
Female representation in boardrooms	19%	30%	France (44%)

The data suggests that Romania lags behind EU averages in all key gender equality indicators, highlighting the need for more robust national policies that align with EU directives.

While the EU has made significant progress in promoting gender equality in leadership, disparities persist, particularly in Eastern European countries like Romania. Cultural barriers, weak policy enforcement, and economic disparities contribute to Romania's gender gap in leadership. To bridge this gap, stronger legislative measures, cultural shifts, and increased investment in female leadership programs are necessary. By aligning more closely with successful EU policies and enforcing gender quotas more effectively, Romania could accelerate its progress toward gender parity in leadership roles.

## 2. Gender Representation in Leadership: An Overview.

According to the *Gender Equality Index 2024*, the EU's overall score has improved, yet significant disparities remain across member states (EIGE, 2024). While Sweden ranks highest with a score of 82 points, Romania scores 57.5 points, the lowest among EU countries.

### 2.1. Women in Political Leadership

- Women's representation in the European Parliament declined in 2024 to 39%, reversing an upward trend.
- In Romania, women occupy less than 20% of parliamentary seats, significantly below the EU average of 33% (EIGE, 2024).
- Gender quotas have proven effective in countries like Spain and France, where legislative mandates require gender-balanced candidate lists (Giddens, 2023: 67).

### 2.2. Women in Economic Leadership

- The percentage of women on corporate boards in the EU reached an all-time high of 33%, largely due to binding quotas (OECD, 2023).
- In Romania, only 12% of top executive positions in the private sector are held by women (EIGE, 2024: 23).
- The gender pay gap remains high, with women in Romania earning 19% less than men on average (Eurostat, 2024).

### 2.3. Barriers to Leadership

- Cultural attitudes toward gender roles remain a major obstacle in Romania, where 67% of the population believes men are better suited for leadership roles (EIGE, 2024).
- Gender-based violence and workplace harassment further limit women's career advancement, with 25% of women reporting experiences of workplace discrimination (ILO, 2024).

According to the Gender Equality Index 2024, the EU's overall score has improved, yet significant disparities remain across member states (EIGE, 2024). While Sweden ranks highest with a score of 82 points, Romania scores 57.5 points, the lowest among EU countries. Despite progress in gender equality policies and increased awareness of gender-based discrimination, women continue to be underrepresented in leadership positions, both in politics and the corporate sector. The structural barriers that perpetuate this disparity include deep-seated cultural attitudes, economic inequalities, and workplace discrimination, which hinder women's access to leadership roles.

In political leadership, representation has stagnated or even regressed in certain regions. The European Parliament saw a decline in women's representation in 2024, dropping to 39% after a period of steady growth. This trend highlights the fragility of gender equality gains, as political and social shifts can easily undermine progress (European Parliament, 2023). In Romania, the gender gap in political representation is even more pronounced, with women holding less than 20% of parliamentary seats, a figure that lags significantly behind the EU average of 33% (EIGE, 2024). Legislative measures such as gender quotas have proven effective in some EU countries, particularly in Spain and France, where mandates requiring gender-balanced candidate lists have led to greater female representation in governance structures (Giddens, 2023: 67). The success of these policies suggests that institutional interventions remain a crucial mechanism for promoting gender parity in political leadership.

Economic leadership follows a similar pattern, with incremental progress but persistent inequalities. The percentage of women serving on corporate boards in the EU has reached 33%, marking an all-time high largely driven by binding quotas (OECD, 2023). However, despite this progress at the board level, women remain significantly underrepresented in executive roles, where key decision-making occurs. In Romania, for instance, only 12% of top executive positions in the private sector are occupied by women (EIGE, 2024: 23). This disparity reflects broader structural barriers, including the gender pay gap, limited access to mentorship opportunities, and discriminatory hiring and promotion practices. Women in Romania earn, on average, 19% less than their male counterparts (Eurostat, 2024), a gap that persists across various sectors despite legislative efforts to promote pay transparency.

Research suggests that gender quotas in corporate leadership can accelerate progress, but they must be complemented by broader cultural and structural changes. For example, in France, where binding quotas mandate gender balance on corporate boards, women's representation has increased significantly; however, this has not necessarily translated into more women in executive leadership roles (European Commission, 2022). Similarly, in Germany, where gender quotas have been implemented with moderate success, the lack of work-life balance policies and childcare support continues to limit women's career advancement (York & Glenn, 2022). These findings underscore the importance of a holistic approach that includes both legislative mandates and supportive social policies.

One of the most significant barriers to women's leadership advancement is cultural resistance to gender equality. In Romania, 67% of the population believes that

men are better suited for leadership roles than women (EIGE, 2024). This perception reinforces discriminatory hiring and promotion practices and contributes to workplace cultures that discourage women from pursuing leadership positions. Studies show that cultural attitudes towards gender roles are deeply ingrained and difficult to change without sustained policy interventions and public awareness campaigns (Verloo, 2021). Additionally, gender-based violence and workplace harassment create further obstacles for women in leadership. The International Labour Organization (ILO) reports that 25% of women in Romania have experienced workplace discrimination, a factor that significantly limits their career mobility (ILO, 2024). Addressing these issues requires comprehensive policies that not only promote gender equality in leadership but also combat the underlying social norms that sustain gender disparities.

Another key challenge is the work-life balance dilemma, which disproportionately affects women due to traditional gender roles in caregiving. Women in leadership often face the "double burden" of managing both professional responsibilities and domestic duties, which can impede their career progression (York & Glenn, 2022). The European Commission's Directive on Work-Life Balance for Parents and Carers (2019) aims to address this issue by promoting paid parental leave and flexible work arrangements. However, implementation varies widely across member states, and in countries like Romania, cultural expectations around motherhood continue to act as a barrier to women's full economic participation (European Commission, 2021).

Moreover, intersectionality plays a crucial role in understanding gender disparities in leadership. Women from marginalized backgrounds, including ethnic minorities and those with disabilities, face compounded discrimination that further limits their access to leadership roles (Petrescu & Muntean, 2022). Policies aimed at increasing gender representation must also consider these intersecting inequalities to ensure that progress is inclusive and sustainable.

The economic benefits of gender diversity in leadership are well-documented. Companies with more women in executive positions tend to perform better financially and exhibit stronger governance structures (OECD, 2022). Research suggests that diverse leadership teams are more innovative and better equipped to navigate complex global markets (Smith, 2022). Yet, despite these advantages, progress remains slow, indicating that structural barriers outweigh the clear economic incentives for gender parity.

Looking ahead, achieving greater gender representation in leadership requires a multi-pronged approach. Legislative measures such as gender quotas have proven effective in increasing representation, but they must be reinforced by broader cultural and organizational changes. Policies that promote pay transparency, parental leave, and anti-discrimination protections are essential for creating an environment where women can thrive in leadership roles. Additionally, targeted efforts to change public perceptions of gender roles, including education and media representation, can help shift societal attitudes and reduce bias against women in leadership (Stan & Toma, 2023).

In conclusion, while progress has been made in advancing gender equality in leadership, significant challenges remain. The European Union has implemented various policies aimed at increasing women's representation in both political and economic leadership, but disparities persist due to cultural attitudes, economic barriers, and workplace discrimination. Addressing these issues requires a comprehensive strategy that includes legislative mandates, cultural change initiatives, and structural reforms to promote a more inclusive leadership landscape. Without sustained efforts, the gender gap in leadership will continue to hinder progress toward a more equitable society.

### 3. The Role of Gender Equality Policies

EU policies such as the *Gender Equality Strategy 2020-2025* and the *Pay Transparency Directive* have facilitated progress in gender representation (European Commission, 2023). However, implementation varies across member states.

#### 3.1. Gender Quotas and Their Impact

- Countries with legally binding quotas, such as France and Belgium, have seen a 25% increase in female leadership representation (Smith, 2022: 30).
- Romania's voluntary gender quotas have been largely ineffective, with **no** penalties for non-compliance (EIGE, 2024).

Gender quotas have been instrumental in promoting gender diversity in leadership roles across the European Union. Countries that have implemented legally binding quotas, such as France and Belgium, have witnessed a 25% increase in female leadership representation (Smith, 2022: 30). These quotas have effectively ensured that women have access to high-level decision-making positions and have contributed to broader shifts in workplace dynamics. France's quota law, for example, mandates that at least 40% of board members in large companies must be women, leading to a significant transformation in corporate governance structures (European Commission, 2022). Similarly, Belgium's gender quota legislation has improved representation not only in politics but also in private-sector leadership roles, demonstrating the broader applicability of such policies (Freidenvall & Krook, 2021).

However, the impact of gender quotas is contingent upon their enforcement mechanisms. In Romania, where gender quotas remain voluntary and lack penalties for non-compliance, their effectiveness has been minimal (EIGE, 2024). Many political parties and private corporations have failed to implement meaningful changes, resulting in persistently low female representation in leadership roles. Research indicates that voluntary quotas often fail to produce significant outcomes unless they are backed by legal enforcement and institutional commitment (Krook & O'Brien, 2021). Additionally, cultural factors play a significant role in shaping attitudes towards gender representation. In Romania, traditional gender norms continue to reinforce the perception that leadership roles are more suited for men, creating resistance to policy-driven efforts aimed at increasing female representation (Petrescu & Muntean, 2022).

The economic implications of gender quotas are also noteworthy. Studies have shown that companies with gender-diverse leadership teams tend to perform better financially, exhibit stronger governance, and foster more inclusive work environments (OECD, 2022). Yet, despite these advantages, many European countries remain hesitant to adopt binding gender quotas, often citing concerns over meritocracy and corporate autonomy (Verloo, 2021). Critics argue that quotas may lead to tokenism, where women are appointed to leadership roles primarily to meet regulatory requirements rather than based on merit (Popescu, 2023). However, research suggests that once quotas are implemented, women in leadership positions often prove just as competent as their male counterparts, dispelling myths about forced inclusion (Smith, 2022: 30).

In addition to gender quotas, work-life balance policies have played a crucial role in increasing female workforce participation, particularly in leadership positions. Scandinavian countries, which have some of the most progressive parental leave policies in the world, report significantly higher rates of female employment and leadership participation compared to other EU member states (York & Glenn, 2022). Sweden, for example, provides generous parental leave benefits and flexible work arrangements, enabling women to balance career aspirations with family responsibilities (European Commission, 2019). These policies have contributed to a more equitable distribution of

domestic and professional responsibilities, allowing women to pursue leadership roles without sacrificing family commitments.

### **3.2. Work-Life Balance and Family Policies**

- Scandinavian countries, with robust parental leave policies, have higher female workforce participation (York and Glenn, 2022).
- Romania's limited childcare support and traditional family expectations contribute to a lower employment rate for women, particularly mothers (EIGE, 2024: 45).

Romania's limited childcare support and rigid family expectations contribute to lower employment rates among women, particularly mothers (EIGE, 2024: 45). The lack of accessible and affordable childcare services places a disproportionate burden on women, forcing many to prioritize domestic responsibilities over career advancement. This dynamic is reflected in Romania's low female labor force participation rate compared to the EU average (Eurostat, 2024). Studies indicate that without comprehensive work-life balance policies, women are significantly less likely to pursue leadership opportunities, as they face structural constraints that limit their career progression (York & Glenn, 2022).

Moreover, the gender pay gap remains a persistent barrier to women's leadership advancement. In the EU, women earn, on average, 13% less than men, with Romania exhibiting an even higher disparity at 19% (Eurostat, 2024). This wage gap not only reflects gender-based discrimination but also affects long-term career trajectories, as lower earnings limit women's ability to accumulate wealth, invest in professional development, and achieve financial independence (Blau & Kahn, 2020). The Pay Transparency Directive, introduced by the European Commission, aims to address these disparities by increasing salary transparency and holding employers accountable for wage discrimination (European Commission, 2023). However, the effectiveness of this directive will largely depend on its enforcement and the willingness of companies to adopt transparent pay structures.

Another critical factor influencing women's leadership representation is the prevalence of workplace harassment and gender-based discrimination. The International Labour Organization (ILO) reports that 25% of women in Romania have experienced workplace discrimination, a figure that directly impacts their career mobility (ILO, 2024). Harassment and bias in the workplace create hostile environments that discourage women from seeking leadership positions, further reinforcing gender disparities. Addressing these issues requires stronger legal protections, organizational accountability, and cultural shifts that challenge discriminatory workplace norms (Stan & Toma, 2023).

Despite the progress made in some areas, the road to achieving full gender parity in leadership remains long and complex. Policies such as gender quotas, parental leave, and pay transparency measures have proven effective in many contexts, but their success depends on enforcement, cultural acceptance, and institutional commitment (OECD, 2023). Moving forward, a combination of policy interventions, corporate accountability, and societal awareness will be necessary to dismantle the barriers that prevent women from reaching leadership positions. Without sustained efforts, gender disparities in leadership will continue to persist, limiting the potential for a truly inclusive and equitable society.



#### 4. Statistical Analysis: Romania vs. EU

Using data from the *Gender Equality Index 2024*, this section provides a comparative analysis.

Indicator	EU Average	Romania
Women in Parliament (%)	33%	20%
Women in Corporate Boards (%)	33%	12%
Gender Pay Gap (%)	13%	19%
Women's Employment Rate (%)	67%	56%
Public Perception of Women as Leaders (%)	48%	67%

Sources: *EIGE (2024)*, *Eurostat (2024)*, *OECD (2023)*.

Despite some progress, Romania continues to lag behind the EU average in nearly all gender equality indicators. The proportion of women in parliament remains significantly below the EU average, reflecting persistent structural and cultural barriers that hinder female political participation. Research shows that gender quotas in politics have been successful in improving women's representation in countries like France and Belgium, but Romania's voluntary quotas have had little impact due to the lack of enforcement mechanisms (Smith, 2022: 30). A stronger legislative framework, combined with public awareness campaigns, is necessary to challenge societal perceptions and encourage more women to pursue political careers (Popescu, 2023).

The disparity is also evident in corporate leadership. While 33% of board members in EU companies are women, Romania lags behind with only 12% (EIGE, 2024). This gap is largely due to the absence of binding gender quotas and the persistence of gender-biased recruitment and promotion practices. Studies indicate that companies with more women in leadership roles tend to perform better financially, yet many Romanian firms remain resistant to implementing gender balance policies (OECD, 2023). The European Commission's Directive on Gender Balance in Corporate Boards aims to address this issue by setting minimum thresholds for female representation, but implementation varies across member states (European Commission, 2022).

The gender pay gap remains another significant challenge, with Romanian women earning, on average, 19% less than men, compared to the EU average of 13% (Eurostat, 2024). Research suggests that this gap is not solely a result of occupational segregation but also reflects gender-based wage discrimination and differences in career progression opportunities (Blau & Kahn, 2020). In male-dominated industries, women often face barriers to promotion and are more likely to experience wage stagnation compared to their male counterparts (Petrescu & Muntean, 2022). The Pay Transparency Directive introduced by the European Commission aims to combat these disparities by requiring companies to disclose salary information and justify pay differences, but its long-term effectiveness remains to be seen (European Commission, 2023).

The employment rate for women in Romania is also significantly lower than the EU average, at 56% compared to 67% (Eurostat, 2024). This discrepancy can be attributed to several factors, including inadequate childcare support, limited work-life balance policies, and traditional gender norms that place a disproportionate burden of domestic responsibilities on women (York & Glenn, 2022). Scandinavian countries, which have implemented comprehensive parental leave policies and state-subsidized childcare programs, have seen much higher rates of female workforce participation (European

Commission, 2019). In contrast, Romanian policies provide limited support for working mothers, discouraging many women from remaining in the labor force after childbirth (EIGE, 2024: 45).

Public perception of women as leaders remains one of the most significant obstacles to gender equality in Romania. While 48% of the EU population believes that women are equally suited for leadership roles as men, in Romania, this figure drops to just 33% (EIGE, 2024). This deep-rooted bias affects both political and economic spheres, discouraging women from seeking leadership positions and reinforcing discriminatory hiring practices (Stan & Toma, 2023). Changing these perceptions requires long-term efforts in education, media representation, and policy reforms that actively promote female leadership (Verloo, 2021).

The consequences of gender inequality extend beyond individual career prospects and have broader implications for economic growth and social development. Studies indicate that increasing women's participation in leadership roles can lead to more inclusive policies, stronger corporate governance, and improved overall economic performance (OECD, 2022). Countries with higher levels of gender equality tend to have more robust economies, lower levels of income inequality, and higher levels of social well-being (European Commission, 2020). In Romania, bridging the gender gap in leadership would not only enhance economic productivity but also contribute to greater social stability and democratic representation (European Parliament, 2023).

Efforts to address these disparities must be multifaceted, involving legislative measures, corporate accountability, and cultural transformation. Policies such as gender quotas, pay transparency regulations, and work-life balance initiatives have been effective in some EU countries, but their success in Romania will depend on proper implementation and enforcement mechanisms (Freidenvall & Krook, 2021). Furthermore, tackling gender biases in education and media representation is essential to shifting societal attitudes and promoting a more equitable view of women's roles in leadership (Popescu, 2023).

Gender-based discrimination in the workplace, including harassment and biased hiring practices, remains a major obstacle for women seeking leadership positions. The International Labour Organization (ILO) reports that 25% of women in Romania have experienced workplace discrimination, a factor that significantly affects their career trajectories (ILO, 2024). Addressing this issue requires stronger legal protections, corporate training programs, and public awareness campaigns aimed at fostering more inclusive work environments (Krook & O'Brien, 2021).

Overall, Romania's progress toward gender equality remains slow, despite EU policies designed to facilitate change. The statistical analysis highlights key areas where Romania lags behind, particularly in political representation, corporate leadership, wage equality, and employment rates. Bridging these gaps requires a combination of policy interventions, cultural shifts, and organizational commitments to fostering an inclusive leadership landscape. Without sustained efforts, Romania risks further widening the gender disparity, limiting opportunities for women and undermining the country's overall socio-economic progress (Stan & Toma, 2023).

## 5. Policy Recommendations

1. **Legally Binding Gender Quotas:** Romania should adopt mandatory gender quotas in politics and corporate leadership, with financial penalties for non-compliance.
2. **Parental Leave Reform:** Expanding paternity leave and subsidized childcare can increase women's workforce participation.

3. **Workplace Anti-Discrimination Laws:** Stronger enforcement of workplace harassment laws is needed to create a safer environment for women.
4. **Awareness Campaigns:** Public education initiatives can challenge cultural stereotypes regarding women in leadership.

Gender quotas have proven to be one of the most effective mechanisms for increasing female representation in leadership roles. In countries where legally binding quotas exist, such as France and Belgium, there has been a measurable improvement in women's participation in both political and corporate leadership (Smith, 2022: 30). France's corporate quota law, for example, mandates that at least 40% of board seats in publicly traded companies be occupied by women, and this policy has resulted in a substantial increase in female representation (European Commission, 2022). In contrast, Romania's voluntary gender quotas have been largely ineffective due to the lack of penalties for non-compliance, which has allowed political parties and corporations to circumvent meaningful reforms (EIGE, 2024). Research suggests that the introduction of legally binding quotas, backed by financial sanctions for non-compliance, is necessary to drive change (Popescu, 2023).

The economic benefits of gender quotas extend beyond representation. Studies show that companies with diverse leadership teams tend to perform better financially, exhibit stronger governance, and foster more inclusive work environments (OECD, 2023). Gender-balanced leadership teams are more likely to implement policies that promote employee well-being, fair pay, and professional development opportunities for women (Freidenvall & Krook, 2021). Furthermore, political institutions with higher female representation tend to prioritize social policies that support gender equality, such as paid parental leave and equal pay legislation (Krook & O'Brien, 2021).

A significant barrier to women's workforce participation is the unequal distribution of caregiving responsibilities. Expanding parental leave policies and improving childcare support are critical measures to ensure that women can remain in the workforce and advance into leadership roles (York & Glenn, 2022). Scandinavian countries have successfully implemented such policies, leading to increased female labor force participation and a more equitable distribution of caregiving duties between men and women (European Commission, 2019). For instance, Sweden provides extensive parental leave benefits that allow both parents to take time off, reducing the burden traditionally placed on mothers and encouraging fathers to take a more active role in childcare (European Commission, 2020).

In contrast, Romania offers limited paternity leave, and cultural norms still place the primary responsibility for childcare on women (EIGE, 2024). The lack of affordable childcare options exacerbates this issue, forcing many women to reduce their working hours or leave the labor market altogether (York & Glenn, 2022). The introduction of subsidized childcare programs and more flexible parental leave policies could significantly improve women's employment rates, providing them with better opportunities to pursue leadership positions (European Commission, 2019).

Workplace discrimination remains a critical challenge for women seeking leadership roles. The International Labour Organization (ILO) reports that 25% of women in Romania have experienced workplace harassment, which directly impacts their career progression and job security (ILO, 2024). Gender-based discrimination, including biased hiring and promotion practices, continues to limit women's access to top positions in both the public and private sectors (Petrescu & Muntean, 2022). Strengthening workplace anti-discrimination laws and enforcing stricter penalties for harassment can create a safer and more inclusive professional environment for women (Stan & Toma, 2023).

The European Commission's Directive on Work-Life Balance for Parents and Carers aims to address some of these challenges by promoting flexible work arrangements and equal caregiving responsibilities (European Commission, 2019). However, implementation remains inconsistent across EU member states, and Romania has yet to adopt comprehensive policies that align with these recommendations (EIGE, 2024). Without stronger enforcement mechanisms and cultural shifts, progress in gender equality will continue to be slow (Verloo, 2021).

Public perception of women in leadership is another significant barrier that must be addressed. Surveys indicate that 67% of Romanians still believe that men are better suited for leadership roles, compared to an EU average of 48% (EIGE, 2024). These cultural biases not only discourage women from pursuing leadership opportunities but also reinforce discriminatory practices in hiring and promotions (European Parliament, 2023). Public education initiatives, media representation, and awareness campaigns are essential in challenging these stereotypes and fostering a more inclusive perception of leadership (Popescu, 2023).

Educational programs that promote gender equality from an early age can help shift societal attitudes in the long term. Countries that have integrated gender-sensitive curricula into their education systems have seen gradual improvements in gender equality indicators (Giddens, 2023). For example, in Sweden, school programs emphasize equal career opportunities for boys and girls, leading to higher female participation in traditionally male-dominated fields such as STEM (European Commission, 2021). Romania could benefit from similar initiatives that challenge gender stereotypes and encourage young girls to pursue leadership ambitions from an early age (Stan & Toma, 2023).

Media representation also plays a crucial role in shaping public perceptions of gender roles. Research indicates that the portrayal of women in leadership positions in mainstream media influences societal attitudes toward gender equality (Verloo, 2021). Increasing the visibility of female leaders in politics, business, and academia can inspire more women to aspire to leadership roles and challenge traditional gender norms (Petrescu & Muntean, 2022). Ultimately, achieving gender equality in leadership requires a combination of policy interventions, cultural change, and corporate accountability. Romania has made some progress through EU initiatives, but more comprehensive measures are needed to close the gender gap. By implementing legally binding gender quotas, expanding parental leave and childcare support, enforcing workplace anti-discrimination laws, and promoting awareness campaigns, Romania can create a more equitable and inclusive society (OECD, 2023).

Without these reforms, gender disparities in leadership will persist, limiting opportunities for women and hindering the country's economic and social development. The evidence suggests that gender-balanced leadership leads to better governance, stronger economies, and a more just society. As such, policymakers, businesses, and civil society must work together to ensure that gender equality is not just a policy goal but a reality for future generations (European Commission, 2023).

**6. Conclusion.** This study highlights the persistent gender disparities in leadership roles between Romania and the EU. While the EU has made substantial progress through quotas and policy interventions, Romania continues to face systemic barriers. Implementing targeted gender equality policies is essential to fostering inclusive leadership and achieving sustainable progress in gender representation.

Despite legislative efforts and EU-driven policies, Romania remains behind in achieving gender parity in leadership. While the Gender Equality Index 2024 shows moderate improvements across EU member states, Romania continues to rank among the

lowest, with significant gaps in female representation in political and corporate leadership (EIGE, 2024). Structural barriers, such as the absence of binding gender quotas, deeply ingrained gender norms, and insufficient parental leave policies, prevent meaningful progress.

The effectiveness of gender quotas has been demonstrated in multiple EU countries. In France and Belgium, legally binding quotas have led to a 25% increase in female leadership representation, proving that such measures are essential for systemic change (Smith, 2022: 30). In contrast, Romania's voluntary quotas have failed to produce significant results due to weak enforcement mechanisms and the absence of penalties for non-compliance (EIGE, 2024). Research indicates that mandatory quotas, accompanied by sanctions, are necessary to increase female representation in politics and corporate leadership (Krook & O'Brien, 2021).

Economic factors also play a crucial role in gender disparities. The gender pay gap in Romania remains significantly higher than the EU average—19% compared to 13%—limiting women's financial independence and career progression (Eurostat, 2024). Wage discrimination, occupational segregation, and the lack of transparent salary structures further widen this gap (Blau & Kahn, 2020). The European Commission's Pay Transparency Directive aims to mitigate these disparities by requiring employers to disclose salary information and justify pay differences, but its long-term impact in Romania will depend on robust implementation and monitoring (European Commission, 2023).

Work-life balance policies are another area where Romania lags behind. Scandinavian countries, which have comprehensive parental leave and subsidized childcare policies, boast higher female workforce participation rates and a more balanced distribution of caregiving responsibilities (York & Glenn, 2022). In Romania, the limited availability of affordable childcare, coupled with traditional gender expectations, forces many women to leave the labor market after childbirth, contributing to a lower employment rate (56% compared to the EU average of 67%) (EIGE, 2024: 45). Expanding paternity leave, subsidizing childcare, and promoting flexible work arrangements are essential steps in closing this gap (European Commission, 2019).

Cultural attitudes toward gender roles remain one of the biggest obstacles to gender equality in Romania. Surveys indicate that 67% of Romanians believe men are better suited for leadership roles, compared to an EU average of 48% (EIGE, 2024). This societal bias not only discourages women from seeking leadership positions but also reinforces discriminatory hiring and promotion practices (European Parliament, 2023). Addressing these biases requires targeted public education campaigns, increased media representation of female leaders, and gender-sensitive educational curricula (Verloo, 2021).

The prevalence of workplace discrimination further exacerbates gender disparities. The International Labour Organization (ILO) reports that 25% of women in Romania have experienced workplace harassment, a factor that significantly impacts their career advancement and job security (ILO, 2024). Stronger anti-discrimination laws, corporate training programs, and stricter enforcement mechanisms are necessary to create a safer and more inclusive work environment for women (Stan & Toma, 2023).

The economic benefits of gender equality in leadership are well-documented. Research shows that companies with gender-diverse leadership teams tend to perform better financially, demonstrate stronger governance, and foster more inclusive workplace cultures (OECD, 2023). Countries with higher levels of female political representation also tend to implement more progressive social policies, leading to improved economic growth and social well-being (European Commission, 2020). Bridging the gender gap in Romania

would not only enhance democratic representation but also contribute to broader economic and social stability (Petrescu & Muntean, 2022).

To achieve sustainable progress in gender representation, Romania must adopt a multi-pronged approach that includes legislative reforms, corporate accountability, and cultural transformation. Implementing legally binding gender quotas, strengthening workplace anti-discrimination laws, expanding parental leave policies, and promoting public awareness campaigns are crucial steps in fostering an inclusive leadership landscape (Freidenvall & Krook, 2021). Without these reforms, gender disparities in leadership will persist, limiting opportunities for women and hindering the country's overall socio-economic development (Stan & Toma, 2023).

This study underscores the urgent need for policy interventions to address systemic gender inequalities in Romania. While the EU has made substantial progress in promoting gender-balanced leadership, Romania must intensify its efforts to align with these advancements. By prioritizing gender equality policies, investing in inclusive workplace practices, and challenging cultural stereotypes, Romania can create a leadership environment where both men and women have equal opportunities to succeed. The path toward gender parity requires sustained political will, corporate commitment, and societal engagement to ensure that progress is not only achieved but also maintained for future generations (European Commission, 2023).

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# Models of Internal Party Democracy: Comparative Lessons from Four Advanced Democracies for Eastern Europe

**Dorin-Cosmin VASILE**

PhD, Doctoral School of Social and Human Sciences, University of Craiova (Romania)

Email: cosminsile@yahoo.com

**Vlad Ovidiu CIOACĂ**

PhD, Doctoral School of Social and Human Sciences, University of Craiova (Romania)

Email: cioacavladovidiu@gmail.com

**Abstract:** *This article presents a comparative analysis of international best practices in the internal organization and functioning of political parties, focusing on four consolidated democracies: Germany, Sweden, Canada, and New Zealand. Using a theoretical and institutional framework, the study identifies the core dimensions of good party governance—intra-party democracy, procedural transparency, financial ethics, and public accountability—and examines how these principles are implemented and sustained in different national contexts. Germany exemplifies strong legal regulation and federal decentralization; Sweden highlights the normative power of civic trust and gender equality; Canada combines professionalization with legislated ethical standards; and New Zealand demonstrates the transformative potential of digitalization for civic participation and institutional accountability. The article concludes with a set of lessons and recommendations applicable to Romania and other Eastern European democracies, arguing that a context-sensitive adaptation of these models can contribute to rebuilding public trust and strengthening democratic infrastructures. More than a technical exercise, party reform is framed as a normative and institutional project essential to the future credibility of democratic politics in the region.*

**Keywords:** *intra-party democracy; organizational transparency; comparative best practices; political reform in Eastern Europe; ethics and accountability in parties; Romania.*

## 1. Introduction

Political parties are essential institutions of representative democracy, performing functions such as political recruitment, interest aggregation, and policy articulation (Diamond & Gunther, 2001; Katz & Mair, 1995). However, the democratic legitimacy of parties depends not only on their electoral roles but also on their internal organization. Intra-party democracy, transparency in decision-making, and ethical financial practices are increasingly regarded as vital indicators of a healthy democratic system (Scarrow, 2005; Rahat & Hazan, 2001).

The emergence of the so-called "cartel party" model, characterized by professionalization, centralized leadership, and increased dependence on state resources, has raised concerns about declining internal democracy and public accountability (Katz & Mair, 1995). These concerns are especially pronounced in post-communist or hybrid democracies, where formal party structures often mask informal networks of control and clientelism (Van Biezen, 2004).

In response, international academic and institutional frameworks have highlighted the importance of codifying internal democratic practices. Studies by Rahat and Hazan (2001) propose analytical dimensions of candidate selection and party decision-making processes, while empirical research by Cross and Katz (2013) compares intra-party democratization across multiple democratic systems. These studies show that best practices are context-dependent, but certain models—particularly from Germany, Sweden, Canada, and New Zealand—illustrate how institutionalized rules, organizational transparency, and member participation can reinforce both party integrity and



democratic trust.

This article proposes a comparative analysis of these four cases, selected based on criteria such as institutional longevity, clarity of legal frameworks, and documented mechanisms of internal accountability. The aim is not to promote imitation, but to extract useful organizational patterns that may inspire reform in systems struggling with opacity and political disengagement, including those in Eastern Europe.

## 2. Theoretical Framework and Criteria for Selecting Models of Best Practices

The study of political parties has long emphasized their dual role as both agents of democratic representation and as organizations with internal logics of power, regulation, and institutionalization (Panebianco, 1988; Katz & Mair, 1995). As such, understanding *best practices* in party organization requires a conceptual framework that addresses not only external functions (e.g., electoral competition, policy mediation) but also internal dimensions: structure, leadership selection, member participation, accountability, and transparency.

In this context, Robert Michels provides one of the most influential theoretical contributions to the study of intra-party dynamics through his formulation of the "iron law of oligarchy" in 1911. According to this principle, any mass-based political organization, regardless of its initial democratic orientation, inevitably tends to develop a rigid hierarchy and fall under the control of a small group of leaders who monopolize decision-making and perpetuate their authority. While the formal structure may retain participatory appearances, in practice, leadership becomes increasingly unaccountable to the membership and often pursues its own interests rather than those of the collective. This structural tendency undermines genuine mechanisms of representation and imposes substantive constraints on internal democracy, offering a critical framework for assessing leadership selection practices, member participation, and organizational transparency (Otovescu, 2009: 151).

A central concept in the analysis of party organization is **intra-party democracy (IPD)**. This term refers to the degree to which ordinary party members are involved in key decision-making processes, such as leadership elections, candidate nominations, and policy development (Scarrow, 2005). While some scholars caution against equating more participation with greater effectiveness (Michels, 1915), others argue that IPD can increase party responsiveness, prevent elite capture, and enhance legitimacy (Rahat & Hazan, 2001; Cross & Katz, 2013). IPD is not a singular model but a spectrum, varying by institutional rules, political culture, and electoral systems.

Another critical axis is **organizational transparency**, referring to the visibility and accessibility of internal decisions, financial flows, and procedural norms. Transparency contributes to trust in parties and is often regulated through party laws and public oversight mechanisms (Van Biezen & Kopecký, 2007; Casal Bértoa et al., 2014). Transparency also overlaps with the legal regulation of party finance, especially concerning donation disclosure, public funding, and audit requirements (Ohman, 2014).

Finally, **functional autonomy and democratic accountability** are often in tension. While hierarchical control may ensure electoral coherence, excessive centralization can undermine pluralism and member agency (Poguntke et al., 2016). Therefore, best practices should be assessed not only by normative ideals but also by how effectively parties balance internal democracy, efficiency, and public accountability.

### Selection Criteria for Case Studies

This article identifies best practices in four democratic systems based on the following criteria:

1. **Democratic maturity and institutional stability** – The countries selected have long-standing democratic institutions with functioning rule of law.
2. **Codified frameworks for internal party democracy and transparency** – Legal and normative structures regulate party organization beyond minimum formalities.
3. **Documented innovations or successful reforms** – The presence of mechanisms considered exemplary in comparative party research.
4. **Relevance and transferability to other democratic contexts** – Practices that, while embedded locally, offer potential lessons for systems in transformation or reform.

Based on these criteria, the article examines party organization models from Germany, Sweden, Canada, and New Zealand—countries that provide institutional diversity, regional variation, and contrasting approaches to party governance.

### 3. International Models of Best Practices

#### 3.1. Germany – Internal Democracy and Federal Organization of Parties

Germany offers one of the most institutionalized models of internal party democracy in Europe, shaped by its federal constitutional structure, a strong legal framework, and a political culture that emphasizes transparency and procedural legitimacy. Political parties in Germany are not only voluntary associations but are explicitly recognized and regulated by the **Basic Law (Grundgesetz)**, which in Article 21 mandates that "their internal organization must conform to democratic principles" (Grundgesetz für die Bundesrepublik Deutschland, Art. 21).

A cornerstone of German party regulation is the **Parties Act (Parteiengesetz)**, first adopted in 1967 and repeatedly amended to enhance transparency and internal democracy. The law codifies requirements regarding leadership elections, member rights, financial disclosure, and internal accountability (Deutscher Bundestag, 2022). Specifically, it mandates that party leadership must be elected by secret ballot and that members have the right to participate in decision-making processes, including the formulation of party platforms and the selection of candidates (§ 9, ParteienG).

The German party system is deeply shaped by the federal structure of the state. Parties are organized at multiple levels—local, regional (Land), and national—each with autonomous internal bodies, reflecting the **principle of subsidiarity**. This federal layering encourages responsiveness to regional concerns and inhibits over-centralization (Roberts, 2003). It also allows for considerable variation in internal procedures across regional branches, while maintaining coherence through national statutes.

Candidate selection within German parties reflects a balance between centralized and decentralized mechanisms. For Bundestag elections, candidates are generally selected in **district-level party conventions**, where registered members or their elected delegates vote. Though party leadership can influence rankings on party lists, the process is subject to internal contestation and formal procedural rules (Bille, 2001; Poguntke et al., 2016).

Financial transparency is another strong point of the German model. Political parties are required by law to publish **detailed annual reports**, audited externally and submitted to the **President of the Bundestag**, who makes them publicly available. These reports include income from public funding, membership fees, donations (with names of donors for contributions above €10,000), and expenditures (Deutscher Bundestag, 2022; Casas-Zamora & Zovatto, 2016).

While challenges remain—such as declining party membership and increasing reliance on public funding—the German case illustrates how **legal institutionalization**, **federal decentralization**, and **formalized participation rights** can collectively sustain a high standard of intra-party democracy and organizational accountability.

### 3.2. Sweden – Transparency and Gender Equality in Political Parties

Sweden is often cited as a model of democratic transparency and gender equality in political life. The foundations of its political culture are built on the principles of openness (*öppenhet*) and egalitarianism, which have shaped the organization and functioning of political parties since the early 20th century. While not governed by stringent statutory regulations on internal party democracy, Swedish political parties have voluntarily adopted robust mechanisms for ensuring representativeness, financial transparency, and gender balance (Bergqvist, 1999; Bjarnegård & Freidenvall, 2015).

In the realm of **gender equality**, Sweden's parties have implemented voluntary but effective quota systems. The most well-known is the *zipper system* (*varannan damernas*), introduced by the Social Democratic Party in the early 1990s, which alternates male and female candidates on party lists to ensure parity (Freidenvall, 2006). Similar practices have been institutionalized by the Green Party and the Left Party, resulting in sustained high levels of female representation in parliament. As of the 2014 general election, women represented 43.6% of the Riksdag, and this share has since stabilized around 45–47%—among the highest in the world (Freidenvall, 2020).

Swedish political parties operate in a **highly transparent environment**, supported by a broader national framework. The *Instrument of Government*, one of Sweden's fundamental laws, guarantees broad public access to official records and proceedings. Although political parties are formally private associations, their financial activities have been increasingly subject to disclosure regulations. Since 2018, Swedish law has required parties to submit detailed annual reports to the Legal, Financial and Administrative Services Agency (*Kammarkollegiet*), including information on donations, expenditures, and party assets (Bjarnegård et al., 2021).

These measures are not the product of coercive legislation alone, but of **deep-rooted normative expectations** around accountability and equality. Party membership structures are relatively open, candidate selection is decentralized and deliberative, and public funding is contingent on compliance with transparency requirements (Pierre, 2001). Moreover, the establishment of the **Swedish Gender Equality Agency** in 2018 reflects the institutionalization of gender as a cross-cutting priority in governance, including political representation.

In sum, the Swedish model combines **voluntary party-level reforms**, strong **civic norms**, and **regulatory scaffolding** to sustain a system in which gender parity and transparency are not exceptions, but expectations. While not immune to critique—especially regarding intersectional representation or party membership decline—Sweden offers a compelling case of how democratic innovation can emerge from within parties themselves, supported by a political culture of openness.

### 3.3. Canada – Professionalization and Ethics in Party Functioning

Canada represents a mature liberal democracy where political parties have undergone a marked process of professionalization while maintaining a normative commitment to transparency and ethical governance. This evolution has been shaped both by internal organizational reforms and by substantial legal changes aimed at increasing accountability in the political system.

One of the defining features of Canadian party politics in recent decades is the increasing centralization and professionalization of campaign operations and leadership selection. As Cross and Young (2002) argue, Canadian parties have developed stronger central offices and rely more heavily on professional staff, consultants, and data-driven strategies. This has enhanced electoral effectiveness but has also raised concerns about the diminishing role of grassroots members in shaping party policy and direction (Cross & Pilet, 2015).

Ethical governance in Canada is anchored in robust legislative frameworks. The **Federal Accountability Act** (2006) introduced major reforms to political finance, including banning corporate and union donations, capping individual contributions, and enhancing the transparency of lobbying activities (Government of Canada, 2006). These measures were introduced in response to public concern over corruption and undue influence, most notably following the sponsorship scandal of the early 2000s.

Further reforms came with the **Elections Modernization Act** (2018), which refined rules on third-party advertising, foreign influence, and reporting obligations for political entities. The act introduced stricter deadlines and clearer disclosure requirements for political financing, including real-time reporting of contributions during election periods (Elections Canada, 2019).

In parallel, Canada has promoted ethical standards through **internal party codes of conduct** and government-wide initiatives. For instance, the 2015 *Open and Accountable Government* directive established ethical expectations for ministers, including transparency in decision-making, avoidance of conflicts of interest, and the duty to act in the public interest (Privy Council Office, 2015). While these codes are not legislated, they exert normative influence and help structure expectations for political behavior.

Despite this framework, challenges remain. High-profile cases such as the **SNC-Lavalin affair** in 2019 exposed tensions between political strategy and ethical decision-making, sparking renewed debates about the independence of public prosecutors, ministerial responsibility, and the integrity of party-government relations (Marland, 2020).

Nevertheless, Canada's model demonstrates a conscious balancing act: embracing professionalization for organizational efficiency, while embedding ethical safeguards into both law and political culture. Though not immune to criticism, the Canadian case highlights the role of **formal rules, independent oversight, and institutionalized norms** in maintaining public trust in party democracy.

### 3.4. New Zealand – Digitalization, Participation, and Public Accountability

New Zealand is internationally recognized for its commitment to democratic governance, transparency, and civic engagement. In recent years, the country has leveraged digital technologies to enhance citizen participation and public accountability, reinforcing its democratic institutions.

The New Zealand government has actively pursued digital initiatives to facilitate public engagement in policymaking. A 2017 research project by the Department of Internal Affairs explored how digital tools can support participation in government decision-making processes. The study emphasized the need for a more flexible and open government culture, advocating for long-term, two-way conversations with communities, particularly those traditionally experiencing digital exclusion, such as Māori and Pasifika populations (Department of Internal Affairs, 2018).

Platforms like Policy.nz have emerged to simplify and categorize election policies, allowing voters to compare party positions on various issues. Developed by a team including Ollie Neas and Asher Emanuel, Policy.nz has been utilized in multiple general

elections, providing an accessible resource for informed voting decisions (Policy.nz, 2023).

New Zealand's commitment to transparency is exemplified by the Official Information Act 1982, which mandates the availability of government information to the public. The Public Service Act 2020 further embeds principles of open government and integrity within the public sector (Te Kawa Mataaho Public Service Commission, 2023).

In 2019, the government enacted legislation banning foreign political donations over NZ\$50 and introduced stricter disclosure requirements for political advertising. These measures aimed to mitigate foreign interference and enhance the integrity of electoral processes (The Guardian, 2019).

Despite these advancements, challenges persist. Transparency International New Zealand has highlighted concerns regarding political lobbying, advocating for the establishment of a public register of lobbyists and clearer regulations to prevent conflicts of interest (Transparency International New Zealand, 2023).

Additionally, the Office of the Auditor-General has emphasized the importance of building a stronger public accountability system. A 2021 report underscored the need for public organizations to understand and respond to the diverse needs of communities, fostering trust through genuine engagement and responsibility (Office of the Auditor-General, 2021).

New Zealand's integration of digital technologies into its democratic processes demonstrates a proactive approach to enhancing citizen participation and government accountability. While the country continues to face challenges, its commitment to transparency and innovation serves as a model for other democracies seeking to strengthen their institutions in the digital age.

#### 4. Lessons and Possible Adaptations for Romania and Eastern Europe

The case studies of Germany, Sweden, Canada, and New Zealand provide more than a catalogue of best practices—they offer **four distinct models of party organization**, each rooted in different traditions of statehood, political culture, and civic expectation. Together, they demonstrate that **internal party democracy, transparency, and ethical conduct** are not by-products of abstract democratic ideals, but are sustained through **institutional design, normative pressure, and organizational innovation**. For Romania and other Eastern European democracies, still marked by political volatility, clientelism, and low civic engagement, these models point not only to what should change, but to *how* such change can be meaningfully structured.

##### 4.1. Germany: Formalization and Federalism as Democratic Safeguards

The German model illustrates how **strong legal codification and multi-level party structuring** can act as stabilizers against authoritarian drift and elite capture. The requirement that internal party organization be democratic (*Grundgesetz*, Art. 21), combined with the *Parteiengesetz*, obliges parties to follow procedures that make leadership accountable, finances transparent, and local branches autonomous.

##### What Romania can adapt:

- **A formal requirement for internal democracy in the Constitution**, similar to Germany's Article 21, could elevate intra-party democracy from voluntary good practice to legal expectation.
- **Regional subsidiarity in party structuring**: Adopting a federal-style decentralization of party governance would help large Romanian parties become more responsive to regional dynamics and reduce the concentration of power in Bucharest-centered leaderships.

- **State support conditional on compliance:** Like in Germany, access to public funding could be tied not just to electoral performance but to fulfilling internal transparency and democratic criteria.

#### 4.2. Sweden: Cultural Voluntarism and Normative Pressure

Sweden's parties operate in an environment of **high civic trust and deep social expectations of equality and openness**. Rather than being imposed by law, transparency and gender parity are largely internalized through party rules, quotas, and civic pressure. The success of voluntary tools like the *zipper system* demonstrates how innovation within parties can outpace legislation.

##### What Romania can adapt:

- **Voluntary party charters of transparency and ethics**, adopted with civil society oversight, could act as “soft law” mechanisms to build credibility.
- **Gender parity through internal reform, not just quotas:** Romanian parties could be encouraged to adopt parity in leadership slates, using models like alternating gender placement on lists or ensuring balanced representation in executive organs.
- **Public benchmarking and reputational pressure:** Independent watchdogs could publish annual rankings of party openness and inclusion, stimulating competition in normative performance rather than just electoral results.

#### 4.3. Canada: Professionalization with Ethical Boundaries

Canada exemplifies the **tension—and potential balance—between organizational efficiency and ethical conduct**. Parties have become more centralized and professional, but only by introducing strong ethical codes, contribution caps, and independent oversight. The *Federal Accountability Act* and *Open and Accountable Government* framework reveal how ethics can be institutionalized without stifling party performance.

##### What Romania can adapt:

- **Codes of conduct for party members and elected officials**, publicly available and enforceable through internal ethics boards.
- **Real-time transparency in financing:** Inspired by Canada's requirements, Romanian parties could publish donations and expenditures online in accessible formats, reducing public suspicion.
- **Professionalization of campaign teams:** While Romanian parties have adopted digital strategy superficially, creating permanent internal research and communications departments could reduce dependence on informal consultant networks and “shadow” financing.

#### 4.4. New Zealand: Digitalization and Inclusive Accountability

New Zealand stands out for its **proactive use of digital tools to inform, consult, and engage citizens**. Policy platforms like *Policy.nz* have redefined access to political content. The Public Service Act and strict donation rules demonstrate how transparency can be updated for the digital era, while maintaining accessibility for marginalized groups.

##### What Romania can adapt:

- **Digital platforms for party transparency:** Romanian parties could create online dashboards showing voting records, policy positions, candidate profiles, and campaign budgets, following the *Policy.nz* model.

- **Participatory candidate selection using secure digital tools:** Especially in large urban centers, parties could pilot online primaries or internal deliberative platforms, increasing member involvement and reducing accusations of nepotism.
- **Institutional accountability through citizen-centered reporting:** Inspired by the New Zealand Auditor-General's work, Romanian institutions like the Permanent Electoral Authority could be mandated to publish public-facing reports evaluating not only legal compliance, but also civic value and performance.

#### 4.5. Toward a Composite Eastern European Model

None of the four cases offers a perfect blueprint—but taken together, they allow for the construction of a **composite model** tailored to the Eastern European context:

- From **Germany**, the power of legal clarity and structured federalism.
- From **Sweden**, the mobilizing force of norms and social trust.
- From **Canada**, the institutionalization of ethics and restraint.
- From **New Zealand**, the transformative potential of digital tools and inclusive accountability.

In Romania, where political parties often lack both internal legitimacy and public credibility, the adaptation of these lessons must be **incremental, hybridized, and strategically sequenced**. Reforms should begin with what is most feasible—financial transparency, open internal procedures, digital outreach—before expanding toward deeper cultural and structural change.

Ultimately, the success of such adaptations will depend less on technical design and more on **the political will of party elites, the vigilance of civil society, and the institutional resilience of oversight bodies**. By reimagining parties not just as electoral machines but as democratic infrastructures, Romania and its regional peers have the opportunity to bridge the gap between formal representation and substantive democratic engagement.

#### 5. Conclusions

The comparative inquiry into international models of party organization and internal governance has highlighted the fundamental, yet often underappreciated, role that intra-party democracy, transparency, and ethical accountability play in the consolidation of democratic regimes. While political parties have traditionally been studied as vehicles of aggregation, mobilization, and representation, this analysis has shown that the manner in which parties govern themselves internally is equally determinative of their capacity to foster democratic legitimacy, public trust, and institutional resilience.

The selection of four advanced democracies—Germany, Sweden, Canada, and New Zealand—was neither arbitrary nor illustrative; rather, it was grounded in theoretical criteria that privileged institutional maturity, legal clarity, organizational innovation, and contextual transferability. These cases exemplify different institutional responses to the shared challenges of political representation in contemporary democracies: declining party membership, erosion of civic engagement, electoral volatility, and rising public skepticism toward political elites. Each of these systems has developed distinct yet functionally convergent mechanisms to recalibrate the relationship between party leadership and members, between organizational control and democratic responsiveness, and between electoral pragmatism and normative integrity.

Germany's model illustrates the power of formal legal entrenchment and federal decentralization in institutionalizing internal party democracy. By elevating democratic

organization to a constitutional mandate and operationalizing it through the *Parteiengesetz*, the German system has prevented the emergence of hyper-centralized or charismatic leadership structures that bypass collective deliberation. Furthermore, the subsidiarity principle embedded in federal party structures offers a model of vertical accountability that can correct for excesses at both national and regional levels.

In contrast, Sweden's case demonstrates the efficacy of cultural and normative frameworks, where party openness and gender inclusiveness have been largely driven by voluntary self-regulation, reinforced by deep civic expectations and informal mechanisms of reputational sanctioning. Here, political innovation has proceeded not by legal compulsion but by internal cultural transformation—a path less available in post-communist societies, but nonetheless instructive in the long term.

Canada offers a compelling example of professionalization under ethical constraint. The evolution of Canadian parties toward centralized campaign management and strategic communication has been balanced by a parallel development of ethical regulations, donation caps, and a codified administrative ethos. The Canadian model illustrates that modernization and efficiency do not necessitate the abandonment of democratic norms, provided that ethical boundaries are institutionally embedded and normatively internalized.

New Zealand, finally, reveals the transformative potential of digital governance and citizen-centered accountability. Its use of online platforms for policy communication and electoral information, combined with strict legislation against foreign interference and innovative public engagement tools, shows how technological modernization can serve the ends of democratic deepening, rather than merely accelerating electoral competition.

Taken together, these models suggest that democratic party governance is not a fixed template, but a relational architecture that must adapt to context, culture, and historical trajectory. Yet the core components of such governance—clear procedural rules, participation rights, financial transparency, ethical oversight, and adaptive responsiveness—form a normative grammar of internal party democracy that transcends national boundaries.

For Romania and other Eastern European democracies, which continue to grapple with legacies of authoritarianism, clientelist networks, and structural distrust in political institutions, these international models offer more than institutional emulation—they offer heuristics for reform. The challenge is not to replicate external frameworks mechanically, but to initiate a process of contextual translation, whereby global standards are refracted through local realities to generate sustainable, endogenous change. Reform must begin with achievable goals—such as improving financial transparency, codifying internal procedures, and fostering digital participation—but ultimately aim toward a cultural and structural transformation of political parties as publicly accountable democratic actors.

Importantly, the reform of party organization cannot be understood in isolation. It is inextricably linked to broader systemic reforms: the independence of oversight institutions, the quality of public deliberation, the regulation of political financing, and the protection of civic space. In this sense, party reform is both a technical task and a normative project, requiring coordination between political elites, civil society, academia, and international organizations.

In conclusion, the findings of this article reinforce the theoretical proposition that the internal life of political parties reflects—and shapes—the broader health of a democratic polity. Where parties are opaque, hierarchical, and ethically compromised, democratic institutions are likely to suffer erosion from within. Conversely, where parties



are transparent, participatory, and normatively aligned with democratic ideals, they can serve as engines of democratic resilience. The experiences of Germany, Sweden, Canada, and New Zealand provide not models to be copied, but trajectories to be understood, adapted, and applied. For Romania and the wider post-communist space, engaging seriously with these lessons is not merely desirable—it is essential for the regeneration of trust, the stabilization of representation, and the future credibility of democratic politics itself.

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# How satisfied are travelers? Perceptions of public transport in Timisoara

**Ovidiu-Florin SENDRONI**

PhD Student, West University of Timișoara, Department of Sociology (Romania)  
Email: ovidiu.sendroni00@e-uvt.ro

**Marius VASILUTĂ-ȘTEFĂNESCU**

Associate Professor PhD, West University of Timișoara, Romania, Department of Sociology,  
marius.vasiluta@e-uvt.ro

**Abstract:** Urban public transport plays a fundamental role in the sustainable development of cities, having a significant impact on the environment, social cohesion and economic efficiency. The efficiency of this system depends, however, on the degree of user satisfaction, which is influenced by factors such as the frequency of means of transport, comfort, accessibility and safety of travel. The present study aims to investigate the perception of Timișoara residents on public transport services, analyzing the extent to which they consider that public transport meets their needs. The research also aims to identify the level of general satisfaction and to determine the main aspects that contribute to a positive experience or, on the contrary, to user dissatisfaction and how these aspects have evolved compared to the previous study. Since it is a longitudinal study, the research question is the following: do users perceive public transport services as satisfactory? The main objective of the study is to analyze the evolution of the level of satisfaction of Timișoara residents about public transport. To collect data, a quantitative methodology was used, based on the application of a questionnaire by field operators, during the period November 6 - November 27, 2024, as a result of which we obtained valid responses from 697 respondents. Data analysis included descriptive statistics, correlational analyses, t-tests. The results demonstrate that the perception of passengers towards public transport in Timisoara tends towards satisfaction, but a slight increase was observed compared to the previous study, some aspects, such as security, being better perceived by passengers.

**Keywords:** passenger satisfaction, public transport, Timișoara

## 1.Introduction

In recent years, urban public transport has become a subject of increasing interest, being essential for promoting sustainability and improving the quality of life in urban environments. (Saif et. al., 2019). It plays an essential role in ensuring accessible and efficient mobility both in urban and peripheral areas, offering residents the opportunity to travel quickly and conveniently to their workplaces, educational institutions or other social and economic activities. In addition, its use contributes to reducing dependence on personal cars, promoting the transition to more sustainable transport solutions, such as walking or cycling, which supports traffic reduction and environmental quality improvement (Tuan et. al., 2022). Also, due to its importance, large cities should prioritize public transport within the urban mobility system and implement a dedicated strategy for its development and expansion in a sustainable and efficient way (Sun & Cui, 2018).

## 2.Benefits of using public transport

Public transport can have positive effects on individual health. According to Bailey and associates (2008), public transport, especially that based on electric vehicles, generates a lower level of pollution per kilometer and per passenger compared to individual transport. In addition, the development of infrastructure oriented towards public transport contributes to the reduction of the use of personal cars, which implicitly

leads to a decrease in polluting emissions and to more sustainable urban mobility; factors that can have beneficial effects on individual health (Litman, 2012). Also, according to an Australian study, people who use public transport tend to use, on average, 5 times more often walking or cycling, compared to those who travel exclusively by private vehicles (Bus Association Victoria, 2010).

Being designed specifically for densely populated areas, public transport can face various infrastructure challenges (Sampaio et al., 2008). For example, in terms of traffic congestion, metro networks contribute exclusively to reducing congestion, providing an efficient alternative for drivers who would otherwise use their own cars. In contrast, public transport modes that share road infrastructure with private vehicles, such as buses and trams, have a mixed effect. On the one hand, they reduce congestion by reducing the number of cars on the road, but on the other hand, they can contribute to traffic jams by reducing speed or by occupying priority lanes dedicated to public transport (Nguyen-Phuoc, 2020). However, an efficient public transport system can reduce traffic by up to 36% (Aftabuzzaman, et al., 2010).

Another benefit of public transportation is the positive impact on the economy. According to a study conducted by Farhadi in 2015 on OECD countries, the development of the public transport system and its infrastructure can have a positive effect on GDP. The positive effects on the economy were also identified in a study conducted by Hong et al. (2011), according to which the development of transport infrastructure is an essential factor for stimulating economic growth. In fact, in regions with poorly developed road networks, investments in land transport generate considerable economic benefits, facilitating mobility and access to markets. Thus, public transport can also be a way to assess economic growth, because economic expansion generates a growing demand for transport services, and the development of infrastructure and transport networks plays an essential role in satisfying this need (Yu et al., 2012).

Public transport also plays a crucial role in reducing social inequalities, providing equitable access to activities essential for the well-being of the population, especially in urban areas (Bocarejo & Urrego, 2022). Taking into account the fact that a fundamental role of urban transport is to facilitate the population's access to daily activities, ensuring the mobility necessary for work, education and other daily obligations (Allen & Farber, 202), it can be used to facilitate access to education for children from vulnerable groups (Sanchez et. al., 2004).

### **3.Public transport evaluation**

The mere existence of a public transport system does not automatically guarantee a satisfactory experience for users. For this service to be positively perceived and consistently used, a detailed understanding of the factors influencing passenger satisfaction is essential (Sukhov et al., 2021).

One of the essential aspects in assessing passenger satisfaction is related to the way public transport works. More specifically, through the system's ability to meet users' needs in terms of frequency of trips, waiting time, punctuality and journey time (Tyrinopoulos & Antoniou, 2008). These characteristics are essential in the overall perception of the system's efficiency and have a direct impact on the decision to use public transport or not. In addition to frequency and waiting time, the feasibility of public transport also influences users' habits. Studies show that passengers tend to adapt their behavior depending on the reliability of the transport system: for example, if a means of transport arrives earlier than the indicated schedule, users may become reluctant to wait, which can cause inconveniences related to the predictability of the service (Tsionas et al., 2017). This feature becomes particularly important for people who use public

transportation for professional or educational purposes, especially young people and middle-aged people who have a strict schedule and depend on efficient transportation (Tavares et al., 2021).

Safety is another key determinant of passenger satisfaction, with implications for both perceived comfort and frequency of public transport use. Safety in public transport includes both road aspects, related to the risk of accidents, and the perception of personal safety, influenced by station lighting, video surveillance or the presence of security personnel (Choi, 2021). In addition, the level of passenger confidence in public transport is determined by the frequency of unpleasant incidents, such as theft, vandalism or antisocial behaviour by other passengers (Lois et al., 2018). Research indicates that a lack of a sense of safety can discourage the use of public transport, especially for vulnerable groups, such as the elderly or women travelling alone (Ha et al., 2019).

Another critical element in the perception of public transport services is accessibility, which is not limited to the proximity of stations to users' homes but also includes transport costs and ease of use of the system. Poor accessibility can significantly limit urban mobility, affecting access to jobs, education and essential services, which can have a negative impact on the quality of life and may even stimulate residential migration (Olfindo, 2021). In addition to distance from transport stations, factors such as payment methods, ticket prices and boarding conditions significantly influence users' perception. Studies show that a pleasant boarding and alighting experience can significantly improve overall passenger satisfaction and influence the frequency of public transport use (Ha et al., 2019).

Comfort is also a fundamental aspect of user satisfaction, having a direct impact on the perception of the journey. Factors that determine comfort include the availability of seats, personal space, temperature control in the vehicle and noise levels (De Palma et al., 2015; Hörcher et al., 2018). In addition, the technical condition of vehicles influences user perception: unpleasant odors, excessive vibrations or sudden acceleration can affect passenger comfort and reduce the likelihood of re-use of the service (Tavares et al., 2021). As public transport modernizes, the integration of technological solutions that optimize the user experience, such as efficient air conditioning systems and ergonomic vehicle design, becomes essential to increase the attractiveness of this mode of transport.

By analyzing these factors, it is possible to draw a clear picture of the determinants of public transport user satisfaction. System functionality, accessibility, comfort and safety are interconnected elements that influence both the perception of the journey and the intention of users to continue using public transport. By optimizing these dimensions, transport operators and decision-makers can contribute to improving the user experience and increasing the attractiveness of public transport as a sustainable alternative to urban mobility based on personal cars.

#### **4. Research methodology**

This research adopts a quantitative approach, using the social survey method, using the questionnaire as a data collection tool. Through this approach, we aimed to analyze the degree of satisfaction of public transport users in Timisoara.

The data collection phase took place between November 6 and November 27, 2024. For data collection, we collaborated with 37 operators, who collected responses from seven important and frequently visited connection points by travelers. These are the following areas: Gara de Nord, Piața 700, Piața Consiliul Europe, Piața Mocioni, Poșta Mare, Spitalul Județean, Soarelui. The operators collected data in pairs of at least two people, to ensure an optimal process and to provide assistance to respondents if necessary.

Following the data collection stage, we obtained 697 valid responses. We used the quota sampling method to be representative of various demographic categories of the public transport user population. Thus, we obtained responses from people aged between 15 and 86, of whom 51.4% are female, while 48.6% are male.

The instrument used in the data collection stage consisted of 16 questions, including a scale Likert from 1 to 5 taken and adapted from the study by Sukhov and associates (2021): *Assessing Travel Satisfaction in Public Transport: A Configurational Approach*. It contained 20 items, referring to satisfaction with the functioning of public transport, the quality and quantity of information provided by the public transport company, the conditions offered, the level of comfort and security felt in public transport. The questionnaire also included questions regarding the means of transport used, travel time, and motivation for using public transport. Also, considering the fact that we aimed to identify how satisfaction with public transport has evolved, we referred to the data obtained in the study „Satisfaction with shared public transport. Case study: Timisoara” (Sendroni & Vasiliuță-Ștefănescu, 2024).

The main objective of the study is to evaluate the evolution of the satisfaction level of Timisoara residents with public transport. The research question analyzes whether users are rather satisfied or dissatisfied with public transport services?

To operate the main objective, we formulated the following main and secondary objectives:

Ob1. Identify current satisfaction with the components of the public transport system.

- Ip1.1. Travelers using public transport in Timisoara have a high degree of satisfaction with elements related to courtesy.
- Ip1.2. Travelers using public transport in Timisoara have a high degree of satisfaction with elements related to functionality.
- Ip1.3. Travelers using public transport in Timisoara have a high degree of satisfaction with security-related elements.
- Ip1.4. Travelers using public transport in Timisoara have a high degree of satisfaction with information-related elements.
- Ip1.5. Travelers using public transport in Timisoara have a high degree of satisfaction with comfort-related elements.

Ob2. Identifying the evolution of satisfaction with the components of the public transport system

- Ip2.1. There are statistically significant differences between the current degree of perceived courtesy and the previous degree of courtesy.
- Ip2.2. There are statistically significant differences between the current perceived degree of functionality and the previous degree of functionality.
- Ip2.3. There are statistically significant differences between the current perceived degree of security and the previous degree of security.
- Ip2.4. There are statistically significant differences between the current perceived level of information and the previous level of information.
- Ip2.5. There are statistically significant differences between the current degree of perceived comfort and the previous degree of comfort.

## 5. Research result

Following the data collection stage, we obtained 697 valid responses, from people aged between 15 and 86. However, the majority of respondents to this study were younger than 40 years old (Md=40). In terms of gender distribution, we recorded responses from 339 male respondents (48.6%), respectively 358 female respondents (51.4%).

Following a frequency analysis, according to the mean value, the most satisfactory aspects of public transport in Timișoara are related to the methods of paying for the trip ( $N=697$ ;  $M=3.94$ ;  $Std=1.271$ ), the quality of the lights ( $N=697$ ;  $M=3.78$ ;  $Std=1.124$ ), respectively the distance to the nearest station ( $N=697$ ;  $M=3.61$ ;  $Std=1.227$ ) (table 1). These results are similar to those obtained in the study conducted in 2023 (Sendroni & Vasiliuță-Ștefănescu, 2024), the method of paying for the trip remaining the most satisfactory aspect of public transport. However, we noticed a slight increase compared to 2023 ( $N_{2023}=907$ ;  $M_{2023}=3.82$ ;  $Std_{2023}=1.103$ ). On the other hand, respondents are less satisfied with the punctuality of the means of transport ( $N=697$ ;  $M=2.74$ ;  $Std=1.274$ ), the waiting time between connections ( $N=697$ ;  $M=2.77$ ;  $Std=1.229$ ), respectively the frequency of departure of public transport means from the station ( $N=697$ ;  $M=2.94$ ;  $Std=1.273$ ) (table 1). We again noticed similarities with the results obtained in the previous study, with the mention that the noise level ( $N_{2023}=907$ ;  $M_{2023}=2.96$ ;  $Std_{2023}=1.107$ ) and air quality ( $N_{2023}=907$ ;  $M_{2023}=2.96$ ;  $Std_{2023}=1.088$ ) in public transport recorded higher values, while the frequency of departures from the station ( $N_{2023}=907$ ;  $M_{2023}=3.13$ ;  $Std_{2023}=1.168$ ) recorded a lower value.

**Table 1: Descriptive statistics on public transport satisfaction items in descending order**

Public transport satisfaction items (Attributes)	N	Average	Standard
How do I pay for the trip?	697	3.94	1,271
The quality of lights in public transport?	697	3.78	1,124
Distance to the nearest transport station?	697	3.61	1,227
The driver's attitude and behavior?	697	3.58	1,244
Comfort level?	697	3.57	1,185
The degree of safety and security you feel on public transportation?	697	3.55	1,277
Conditions for boarding and disembarking public transport?	697	3.43	1,240
Written information provided on public transport?	697	3.35	1,036
The physical space inside public transportation?	697	3.29	1,284
The usefulness of the information provided at bus stops (transport timetables, maps of transport stops, etc.)?	697	3.28	1,194
Cleanliness inside public transport?	697	3.27	1,354
Duration of the trip?	697	3.27	1,242
Advertisements on means of transport?	697	3.26	1,024
The usefulness of public transport mobile apps	697	3.25	1,094
The usefulness of the information on the Tranzy app?	697	3.22	1,048
Air quality in public transport?	697	3.14	1,348
Noise level on public transport?	697	3.00	1,340
Frequency of transport departures from the station?	697	2.94	1,273
Waiting time between connections?	697	2.77	1,229
Punctuality of transportation?	697	2.74	1,274

We continued to perform a descriptive analysis on the scale dimensions. According to the results obtained, the lowest value was recorded by the degree of functionality ( $N=607$ ;  $M=3.20$ ;  $Std=0.83$ ) of public transport (which considers aspects such as their punctuality or the duration of the journey). According to the results, the highest value was obtained by the degree of security felt in public transport ( $N=607$ ;  $M=3.55$ ;  $Std=1.277$ ).

Regarding the satisfaction index with public transport in December 2024, it recorded a value of 3.35. Compared to the previous study (Sendroni & Vasiluță-Stefănescu, 2024), it recorded a slight increase. Continuing the analysis, following t-tests, we observed statistically significant differences between this index and the dimensions related to functionality, information and security, the first two having a lower score, while the degree of security recorded a higher score. In other words, in relation to the general level of satisfaction of respondents with public transport, aspects related to functionality and information can be improved, while those related to security are optimal (table 2). Compared to the previous study, satisfaction with aspects related to the quality of information has registered a slight increase, but is still suboptimal, which means that citizens would like more qualitative information regarding the mode of movement of means of transport. In contrast, the degree of comfort has registered a slight increase. A possible explanation would be due to the introduction of new, more efficient and more comfortable vehicles.

**Table 2: Descriptive statistics on scale dimensions in descending order and significance threshold values of t-tests**

Scale dimensions	N	Mean	Standard	The significance threshold value of the t-test
Functionality	697	3.20	0.830	<0.005
Information	697	3.24	0.824	0.001
Courtesy	697	3.40	0.805	0.069
Comfort	697	3.34	0.956	0.788
Security	697	3.55	1,277	<0.005

We performed a t-test to identify whether there are statistically significant differences between the functionality index in the current study and the functionality index in the previous study (Sendroni & Vasiluta-Stefanescu, 2024). According to the results obtained, there are differences between these two values ( $t(696) = -2.235$ ;  $p = 0.026$ ), satisfaction with the degree of functionality of public transport being higher in the previous study. Following a t-test, we did not detect statistically significant differences between the information index in the current study and the information degree index in the previous research ( $t(696) = 1.879$ ;  $p = 0.061$ ). Following a t-test, we did not detect statistically significant differences between the courtesy index in the current study and the courtesy index in the previous research ( $t(696) = -1.452$ ;  $p = 0.147$ ). We continued the analyses by performing a t-test to identify whether there are statistically significant differences between the comfort index recorded in the current study and the degree of conformity index identified in the previous work. Thus, we observed that there are statistically significant differences between these values ( $t(696) = 5.806$ ;  $p < 0.005$ ), the current index registering higher values ( $M=3.34$ ;  $SD=0.956$ ). Following a t-test, we observed statistically significant differences between the degree of safety felt in public transport in the current study and the degree of safety felt in public transport in the previous study ( $t(696) = 5.986$ ;  $p < 0.005$ ). The results show that the level of perceived security has increased compared to the previous research ( $M=3.55$ ;  $SD=1.277$ ). Following a t-test, we observed statistically significant differences between the public transport satisfaction index of the current study and the public transport satisfaction index of the previous study ( $t(696) = 3.843$ ;  $p < 0.005$ ). The results show that the public transport satisfaction index has increased compared to the previous research ( $M=3.35$ ;  $SD=0.692$ ).



Following a frequency analysis, we noticed that the most used means of transport is the bus (N=637; M=91.4), followed by the tram (N=545; M=78.2), and the trolleybus (N=429; M=61.5). This ranking also resulted from previous research, which denotes a lack of change in travelers' preferences towards public transport. A possible explanation could be the fact that the bus is more accessible and can be used to reach different areas of the city more easily, as evidenced by the fact that 14.2% of respondents use it daily. On the other hand, as the previous research also revealed, the bicycle in the VeloTM system (N=620; M=89), the electric scooter in the TroTM system (N=650; M=93.3) and the boat (N=664; M=95.3) are less frequently used means of transport. A possible explanation would be that they are not sufficiently promoted. Continuing the analysis, we observed that respondents continue to use strictly urban transport routes (N=672; M=96.4), followed by urban-rural (N=267; M=38.3), respectively by transport routes that are strictly rural (N=202; M=29), identifying no significant differences compared to the previous research.

The frequency analysis showed that the subscription remained the most used means of payment (N=360; M=51.6), followed by the bank card (N=148; M=21.2). This aspect confirms the usefulness and preferences of travelers for these payment methods. In contrast, the "Electronic wallet" (N=15; M=2.2) and the one-day ticket - a payment method usually used by people visiting the city - (N=17; M=2.4) remained the least popular ways of paying for the trip. As for the category of beneficiaries of discount/free subscription, pensioners continue to represent the most numerous category (N=181; M=26). They are followed by students (N=113; M=16.2), respectively by pupils (N=83; M=11.9). However, most travelers continue to not benefit from such discounts/freebies (N=302; M=43.3).

Regarding the motivation for using public transport, most respondents claim that they do it to go shopping (N=308; M=44.2). Approximately one third of respondents use public transport to travel to work (N=261; M=37.4), respectively to travel to entertainment venues (cinema, theatre, etc.) (N=230; M=33). And approximately one quarter of them use it to get to their place of study (N=199; M=28.6). Among other reasons for which respondents use public transport, respondents also mentioned visiting relatives, traveling for medical reasons or the impossibility of traveling by car.

We then conducted a frequency analysis to identify the extent to which certain factors might lead travelers to avoid using public transport. The analysis of the mean values indicates that the most influential aspects are the low frequency of transport (N=697; M=3.08; SD=1.209) and the long journey time (N=697; M=3.25; SD=1.095). These results are supported by the lower level of satisfaction with the functionality of public transport. On the other hand, the quality of the vehicles (N=697; M=2.79; SD=1.1) is a less influential factor. This can be explained by the introduction of modern buses and trams in recent years.

The frequency analysis showed that the journey to the station of the predominantly used means of transport takes, for most respondents, approximately 5 minutes (N=176; M=11.19; md=7; mode=5; SD=13.764). Regarding the duration of the journey to the destination (work, school, university, etc.), most respondents state that it is approximately 20 minutes (N=145; M=24.6; md=20; mode=20; SD=13.803). According to the results obtained, the average duration of the return journey is slightly longer (N=139; M=25.81; md=24; mode=20; SD=15.693). A possible explanation could be congestion, which can be more intense after work or study hours.

## 6. Conclusions

Public transport in Timisoara offers certain aspects appreciated by passengers, but there are also numerous challenges that negatively influence user satisfaction. The analysis of the collected data shows that one of the best evaluated aspects is the method of paying for the trip, which suggests that the implemented systems are accessible and efficient. Also, the quality of lighting and the distance to the nearest station are factors that contribute positively to the user experience. The safety felt in public transport is also appreciated, indicating a high level of security perceived by passengers.

However, there are several significant issues affecting passenger satisfaction. The punctuality of transport, the waiting time between connections and the frequency of departures are the most criticized aspects. These problems persist over time and suggest an urgent need to optimize the traffic schedule. Also, air quality and noise levels in transport are aspects perceived as suboptimal, although there was a slight improvement compared to the previous year. The overall functionality of public transport remains one of the weakest dimensions assessed, indicating problems related to travel times and connectivity between routes. Passenger information is still deficient, despite a slight increase compared to the previous study, which suggests that users want clearer and more accessible information about transport.

The analysis of public transport usage patterns shows that the bus remains the most widely used means of transport, followed by tram and trolleybus. This hierarchy has not changed over time, suggesting that buses offer the best coverage of urban routes. Most passengers use public transport for intra-city travel, while urban-rural and rural-rural routes are significantly less used. The main reasons for using public transport include shopping, commuting to work and entertainment, while transport to school or university is less frequent. In terms of payment methods, subscriptions remain the most widely used, followed by contactless bank cards. On the other hand, less popular solutions, such as the “Electronic Wallet” and the one-day ticket, are not preferred by passengers, which can be explained by their lack of promotion or by the fact that they are not perceived as convenient.

The factors that determine the avoidance of public transport include, mainly, the low frequency of transport means and the long journey time. These aspects are also supported by the lower level of satisfaction with the functionality of public transport. On the other hand, the quality of vehicles is perceived as better than in the past, most likely due to the modernization of the transport fleet. Regarding the journey time, most respondents state that it is around 20 minutes, but it increases slightly in the case of return trips, which suggests that traffic is more congested at certain times of the day.

To improve passenger satisfaction, an optimization of the public transport schedule is necessary. Increasing the frequency of trips, especially during peak hours, could reduce waiting times and improve the user experience. Also, the introduction of dedicated lanes for public transport could help reduce delays caused by traffic congestion. Modernization of infrastructure is essential, both by adapting and expanding routes, and by improving stations to facilitate passenger accessibility.

Another important step is to improve passenger information. The development of intuitive mobile applications and the installation of updated electronic signs in stations could ensure better communication of timetables and routes. Also, improving the announcement system in means of transport could help passengers navigate the transport network more easily. In addition to this information, increasing comfort in means of transport is essential. The expansion of the vehicle modernization program could contribute to improving air quality and reducing noise levels, and the implementation of higher cleanliness standards would significantly improve the passenger experience.

To stimulate the use of public transport, it would be beneficial to promote alternative solutions, such as electric bicycles and scooters in the Velo<sup>TM</sup> and Tro<sup>TM</sup> systems. These could become a more popular option if they were better integrated into the existing transport system and effectively promoted. Also, creating more flexible fare packages and introducing personalized subscriptions based on the frequency of use could attract more users.

In conclusion, public transport in Timisoara offers certain facilities appreciated by passengers, but there are also multiple aspects that require improvement. Increasing the frequency of trips, reducing waiting times, modernizing the infrastructure and improving passenger information are some of the essential measures that could contribute to increasing user satisfaction. The implementation of these solutions would transform public transport into a more efficient and attractive alternative for the city's residents.

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# Gender and Future Employability: Insights from Male and Female Students at the West University of Timișoara, Romania

Vasile Lucian DRINC

PhD., West University of Timișoara (Romania)

Email: lucian.drinc@e-uvt.ro

**Abstract:** *This report examines the perceived future employability of students enrolled at the West University of Timișoara in 2023, with a particular focus on gender differences. The research is based on a sample of 1,442 valid responses collected from students across 11 faculties. Employing quantitative research design, the study utilized an online questionnaire structured around six key dimensions to assess students' perceptions. The findings indicate a generally positive level of agreement among all participants regarding the future skills, advantages, and achievements outlined in the questionnaire. Statistical analyses reveal a nuanced pattern in gendered perceptions of employability: while male students tend to express greater optimism about their professional future in certain domains, female students exhibit a more positive outlook in others, things that confirm the data obtained by other studies which focused on this matter: gender. Overall, the results suggest that, despite some variations, students of both genders share largely similar perspectives on their future employability.*

**Keywords:** *gender; work readiness; perceived future employability; labor market; social network*

## 1. Introduction

The employability of graduates has emerged as a crucial issue within the spheres of both economics and education. Universities are increasingly striving to cultivate individuals who are not only capable of navigating the evolving and flexible labor market but also adept at meeting the demands of emerging professions, for which current university curricula may not be fully equipped.

While numerous studies have begun to focus on the post-graduation employment outcomes of graduates, it is equally important to examine students' perceptions of their own employability and the competencies they deem necessary to possess upon receiving their academic degrees.

This study endeavors to explore the perceptions of students at the West University of Timișoara regarding the opportunities their current studies afford them in their post-graduate lives. Additionally, this research will incorporate a gender-based analysis to elucidate any differences in perceptions and experiences between male and female students.

## 2. Theoretical framework

Self-perceived employability:

Various attempts to define employability attribute to this concept several clear sets of capabilities possessed by an individual (Lee Harvey, 2001; Storen & Aamodt, 2010; Geera & Onen, 2019; Wakelin-Theron et al., 2019). These include the ability to obtain a job that aligns with one's aspirations or to retain it if already employed (Rothwell & Arnold, 2007). Additionally, according to other perspectives (Vanhercke, Cuyper, Peeters & De Witte, 2014), employability encompasses the ability to realistically self-assess one's individual employment opportunities, as well as the potential for long-term retention in the desired position.

To be employable is significantly influenced by personal contribution to objective self-assessment and the ability to believe that personal value is important for making a

difference in society, particularly at work, where it is necessary to stand out and differentiate oneself from other professional competitors (Andrews & Higson, 2008). Employability is strongly impacted by self-efficacy and self-perception through metacognition and the skills accumulated over a lifetime, primarily during studies, therefore, it is useful for the specialized literature to focus more on what these self-concepts represent (Qenani, MacDougall & Sexton, 2014).

On the generic skills, commonly referred to as employability skills, Bridgstock (2009) emphasized that they represent the essential transferable and non-technical competencies required in various professional settings. These skills are fundamental to performing effectively at all levels within the workplace because they encompass a range of abilities, including information literacy (e.g., the skill of locating and evaluating information), technological proficiency (e.g., using digital tools and software effectively), written and verbal communication (e.g., expressing ideas clearly and persuasively), teamwork (e.g., collaborating effectively with others), and numeracy (e.g., performing basic mathematical operations and interpreting data). Such skills enable individuals to adapt to diverse job requirements and enhance their professional performance across different contexts (Bridgstock, 2009; Mason, Williams & Cranmer, 2009).

Influences on the self-perception of work readiness:

Based on the human capital theory (Reeskens & van Orschot, 2012), investing in education and skills boosts individual productivity and societal prosperity. In correlations with this, authors claim that better education and training lead to higher employment, increased earnings, and sustainable development, including the fact that the perceived work readiness can be higher if the perceivers have a strong educational background and skills directly related to their professional field (Berntson, Sverke & Marklund, 2006). Strengthening the perceived future employability of individuals are also, researchers say, the status of the psychological contract, the experience within the labour market, individual personality characteristics, the mobility within job positions and, of course, the nature of employment (Berntson et al., 2006; Reeskens & van Orschot, 2012; Sok, Blomme & Tromp, 2013; Kirves, Kinnunen & De Cuyper, 2014).

When addressing the recorded levels of perceived employability among students based on their studies, Jackson & Wilton (2016) and Drinc (2023) highlight that all respondents indicated a high level of perceived employability, regardless of their study cycle or other characteristics. However, they also reported difficulties in accessing social networks related to their professional field and in realistically understanding the labor market demand in their field of study. Furthermore, findings suggest that being employed while studying can increase one's perception of employability, precisely due to the deeper understanding of the field of study gained from practical on-site experience (Jackson & Wilton, 2016; Drinc, 2023).

Social network seems to be one of the most important influences for employability, work readiness skills and social network based education needing even to be embedded in the curriculum across all study years at academic level, consider Benson, Morgan & Filippaios (2014). In the results of their study on social career management, they state that the first-year undergraduates need to learn about CV writing, presentation skills, and creating a positive online profile while understanding employer use of social networks and privacy issues, while second-year students should focus on networking, profile updating, and online social capital for internships and volunteering. Final-year students require deeper insights into researching organizations and critically analyzing social network information for job searches and postgraduate students need advanced knowledge of these skills and their effective use (Benson, Morgan & Filippaios, 2014).

The reputation of the educational institution, reflected in the skills trained and the competencies accumulated by students, is a predictor of future employability, according to Qenani, MacDougall & Sexton (2014). They have identified specific types of competencies through which the university's reputation makes students more prepared for the labor market, mainly highlighting the significant impact on technical skills, domain-specific skills, and generic skills such as critical thinking and communication. An unexpected result shows that the time spent in university, known as academic standing, erodes respondents' opinions regarding how employable they will be, suggesting a potential continuation of studies due to a fear of incompatibility with employers' demands for graduates (Qenani et al., 2014).

Gender as a predictor of self-perceived future employability:

The gender of the respondents appears to be another variable upon which students' perception of their future employability considerably depends. This is also the reason why the present study focuses on the differences between male and female genders regarding optimism about the post-graduation future. Donald, Baruch & Ashleigh (2017) concluded that after analyzing responses from two major American educational centers, females consider themselves much less employable than males.

Studies (Rivera, 2011; Tomlinson, 2012; Qenani et al., 2014; Donald et al., 2017) show that this reluctance of women during their studies can be based on prior knowledge of the possible gender differences made by employers of large companies in assigning positions during recruitment and selection processes, as well as awareness of the wage differences that women face, which typically disadvantage them. At the same time, there are studies that present a similarity between the perceptions of women and men regarding future employability, without strong statistical differences identified (Rothwell, Jewell & Hardie, 2009; Sok et al., 2013).

### **3. Methodology**

This quantitative investigation examines the perception of Romanian higher education students regarding their future employability and explores the variations in responses based on gender. The research targeted respondents enrolled at the West University of Timișoara, encompassing all faculties. The probabilistic sample produced 1442 complete responses.

Data collection took place in 2023, using an online questionnaire based on the "Perceived Future Employability Scale for young adults" developed by Gunawan, Creed & Glendon (2018). The scale, previously tested, had twenty-four sentences structured in six dimensions, to which the presents study added variables regarding the gender of participants, the presence on the labor market, the level of study and the faculty of origin, the academic standing and the volunteering engagement during studies.

The "Perceived Future Employability Scale for young adults" (Gunawan et al., 2018) focuses on the following dimensions which were reflected in the results by using non-parametric tests, decision determined by the consistence of the categories: the perception of future social networks (involves how students can leverage their connections for career advancement and opportunities); perception of future professional experiences (pertains to applying educational experiences to problem-solving tasks and likely receiving employer recognition); perception of future personal development (concerns motivation, stress management, and work ethics); perception of anticipated educational institution reputation (involves the advantages provided by the study program's prestige and institutional partnerships); perception of future labor market knowledge (includes awareness of hiring opportunities, understanding the steps to secure desirable jobs, and being successful); and perception of future skills (relates to possessing

the necessary market skills and securing desired positions).

#### 4. Results

This study draws upon responses from Romanian students, the vast majority being enrolled in Bachelor's programs. Regarding their employment status at the time of data collection, more than 6 out of 10 respondents were not engaged in any form of paid work, whereas 3 out of 10 were already employed.

Additionally, more than 60% of the surveyed students indicated regular participation in volunteering activities or projects. In terms of gender distribution, the main characteristic used in the compared results of this report, the sample consisted of 67% female students and 33% male students, a composition that aligns with the overall gender ratio within the selected institution. The findings presented in this paper focus on identifying potential differences between male and female students concerning the study variables, as detailed in the subsequent tables:

Regarding the perception of future social networks ( $M=4.43/5$ ), there is a high level of agreement among the respondents, as seen in Table 1.1. Statistically significant differences exist between men and women concerning two variables in this dimension. Men express more optimism about leveraging their developed networks during their studies for career success ( $U=209744.5$ ,  $p=.00<0.05$ ). Additionally, men are more optimistic than women about building a social network that will aid them in their careers post-graduation ( $U=216619$ ,  $p=.04<0.05$ ), as shown in Table 1.2.

**Table 1.1 - Descriptive statistics for the perception of the future social network**

total_future_social_network	N		Mean
	Valid	Missing	
	1442	0	4.43

**Table 1.2 - Mann-Whitney U Ranks and Test Statistics for the perception of the future social network**

	Gender	N	Mean Rank	Mann-Whitney U
...I will be able to draw on the network I have developed to succeed at my work.	Feminine	960	698.98	U=209744.5, p=.00
	Masculine	482	764.94	
...I will have built up a social network that will help me do well in my job.	Feminine	960	706.14	U=216619, p=.04
	Masculine	482	750.65	
...I will have developed a network of contacts who can help identify potential work opportunities.	Feminine	960	711.45	U=221713.5, p=.2
	Masculine	482	740.06	
...I will know how to network with people who can help me find work in my chosen career.	Feminine	960	734.02	U=218385, p=.07
	Masculine	482	695.02	

In terms of future professional experiences ( $M=4.31/5$ ), female participants believe that upon completing their studies, they will be more capable of demonstrating their skills to employers and will have relevant work experience applicable to new jobs compared to men. Conversely, men consider their chances of impressing employers to be high and anticipate satisfaction with their acquired work experiences. However, the statistical differences in this dimension are not significant between genders.



**Table 2.1 - Descriptive statistics for the perception of future professional experiences**

total_future_professional_experiences	N		Mean
	Valid	Missing	
	1442	0	4.31

**Table 2.2 - Mann-Whitney U Ranks and Test Statistics for the perception of the future professional experiences**

	Gender	N	Mean Rank	Mann-Whitney U
...I will have had relevant work experience applying the knowledge acquired in my studies.	Feminine	960	728.02	U=224137, p=.35
	Masculine	482	706.98	
...future employers will be impressed with the relevant work experience I have accumulated.	Feminine	960	715.26	U=225368, p=.45
	Masculine	482	732.46	
...future employers will be satisfied with the work experiences I have gained.	Feminine	960	715.77	U=225862.5, p=.48
	Masculine	482	731.43	
...I will be able to show future employers that I have the required practical skills and academic experience they require.	Feminine	960	724.87	U=227168, p=.60
	Masculine	482	713.28	

When examining the dimension of future personal development, notable findings emerge. This dimension exhibits the highest level of trust among respondents, indicating substantial optimism ( $M=4.89/5$ ). Female participants perceive three out of four variables positively for the future, statistically higher than men: confidence in showcasing a strong work ethic ( $U=216993.5$ ,  $p=.04<0.05$ ), clarity of goals ( $U=215930$ ,  $p=.04<0.05$ ), and visible motivation from their achievements ( $U=202042.5$ ,  $p=0<0.05$ ). While male respondents are less optimistic in this regard, they still maintain a high positive statistical mean.

**Table 3.1. Descriptive statistics for the perception of future personal development**

total_future_personal_development	N		Mean
	Valid	Missing	
	1442	0	4.89

**Table 3.2. Mann-Whitney U Ranks and Test Statistics for the perception of future personal development**

	Gender	N	Mean Rank	Mann-Whitney U
...my experiences will show that I have developed resilience and do not give up easily.	Feminine	960	730.17	U=222080, p=.22
	Masculine	482	702.7	
...prospective employers will see from what I have achieved that I am well motivated.	Feminine	960	751.04	U=202042.5, p=0
	Masculine	482	661.05	
...prospective employers will be able to see that I have clear goals for myself.	Feminine	960	736.57	U=215930, p=.04
	Masculine	482	689.92	

...my record will show that I have a strong work ethic.	Feminine	960	735.47	U=216993.5, p=.04
	Masculine	482	692.13	

The study's participants maintain a positive outlook on the reputation of their educational institution ( $M=4.30/5$ ), even before graduation. Although statistical differences between genders are not significant, female subjects believe they will have more advantages in recruitment due to their university's reputation. They also consider their studies a significant asset in securing new employment opportunities, benefiting from the institution's strong partnerships.

**Table 4.1. Descriptive statistics for the perception of the anticipated reputation of educational institution**

total_reputation_educational_institution	N		Mean
	Valid	Missing	
	1442	0	4.30

*Table 3.2. Mann-Whitney U Ranks and Test Statistics for the perception of the anticipated reputation of educational institution*

	Gender	N	Mean Rank	Mann-Whitney U
...I will have an advantage as employers will be more likely to recruit graduates from my university than from others.	Feminine	960	713.27	U=223462.5, p=.30
	Masculine	482	736.42	
...the reputation of my educational institution will be a significant asset to me in job seeking.	Feminine	960	727.33	U=224800.5, p=.40
	Masculine	482	708.36	
...I will have a lot of work opportunities because my teaching institution has strong partnerships with many employers.	Feminine	960	724.94	U=227098, p=.6
	Masculine	482	713.14	
...I will be in demand because graduates from my institution are well prepared for work roles that are in high demand.	Feminine	960	716.28	U=226352.5, p=.53
	Masculine	482	730.41	

The perception of future labor market knowledge amongst students reflects a high level of optimism across all participants ( $M=4.59/5$ ), despite the lack of statistically significant differences. However, female participants score higher than men across all variables in this dimension, particularly in their understanding of diverse work opportunities and occupational trends.

**Table 5.1. Descriptive statistics for the perception of the future labor market knowledge**

total_future_labormarket_knowledge	N		Mean
	Valid	Missing	
	1442	0	4.59

**Table 5.2. Mann-Whitney U Ranks and Test Statistics for the perception of the future labor market knowledge**

	Gender	N	Mean Rank	Mann-Whitney U
...I will have developed a good understanding of the variety of work opportunities available to me.	Feminine	960	729.47	U=222749.5, p=.25
	Masculine	482	704.1	
...I will know the steps I need to take to do well in my chosen career.	Feminine	960	722.51	U=229428, p=.84
	Masculine	482	717.98	
...I will have developed the ability to find out about job opportunities in my chosen field.	Feminine	960	722.44	U=229496.5, p=.85
	Masculine	482	718.12	
...I will be up to date with occupational trends in my chosen field.	Feminine	960	728.62	U=223567.5, p=.30
	Masculine	482	705.8	

Lastly, in the dimension concerning the perception of future skills acquired during studies ( $M=4.62/5$ ), male and female students report similar high scores, with no significant statistical differences. Female students, however, exhibit a more positive outlook on their acquired skills. They believe employers will recognize that they have learned the appropriate disciplines and technical skills and have developed problem-solving abilities frequently sought by employers.

**Table 6.1. Descriptive statistics for the perception of the future skills**

total_perception_future_skills	N		Mean
	Valid	Missing	
	1442	0	4.62

**Table 6.2. Mann-Whitney U Ranks and Test Statistics for the perception of the future skills**

	Gender	N	Mean Rank	Mann-Whitney U
...I will have gained the knowledge required to get the job I want.	Feminine	960	726,7	U=225404, p=.44
	Masculine	482	709,62	
...I will have the relevant skills for the occupation I choose.	Feminine	960	728,83	U=223363.5, p=.29
	Masculine	482	705,37	
...future employers will see that I will have learned the right discipline/skills/knowledge they want	Feminine	960	729,08	U=223121.5, p=.27
	Masculine	482	704,87	
...I'll have developed the reasoning and problem-solving skills that future employers often require.	Feminine	960	734,08	U=218322, p=.08
	Masculine	482	694,89	

## **5. Conclusions and discussions**

The findings indicate a high level of optimism across all participants regarding their future employability. Notably, male students displayed greater confidence in leveraging their social networks for career advancement. They expressed higher optimism about the usefulness of the connections they developed during their studies, which they believed would aid them in identifying job opportunities and succeeding in their careers.

Conversely, female students demonstrated a more positive outlook in several key areas. They were particularly confident in their ability to convey a strong work ethic, clear goals, motivation, and perseverance to prospective employers. Female respondents also believed that their academic achievements and experiences would be highly valued by employers, giving them an edge in demonstrating relevant skills and competencies.

In the dimension of future professional experiences, female students felt more capable of applying their knowledge in practical settings and showcasing their skills to potential employers. Although male students shared a similar level of confidence, the differences between genders in this area were not statistically significant.

Regarding the reputation of their educational institution, both male and female students held a positive view of the advantages conferred by their university's prestige. Female students believed that their studies at West University of Timisoara would significantly enhance their job prospects, thanks to the institution's strong partnerships with potential employers.

In terms of labor market knowledge, the study found no significant gender differences, but female students rated their awareness of job opportunities and occupational trends higher than their male counterparts. This suggests a slightly better understanding among female students of the steps needed to excel in their chosen careers.

Finally, the analysis of future skills development revealed that both male and female students felt confident about the competencies they acquired during their studies. Female students, however, exhibited a slightly more positive outlook on how their technical and discipline-specific skills would be perceived by employers. They believed that these skills would be instrumental in securing their desired positions.

In conclusion, while gender differences in perceptions of future employability exist, both male and female students at the West University of Timisoara generally share a positive outlook on their professional futures. Male students are more confident in their social networking abilities, whereas female students are more optimistic about their personal development and the practical application of their skills. These findings underscore the importance of addressing gender-specific needs and expectations in higher education to better prepare all students for the evolving labor market.

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# Self-Medication in Romania: An Analysis through the Lens of the Health Belief Model

Cosmin-Constantin SICREA

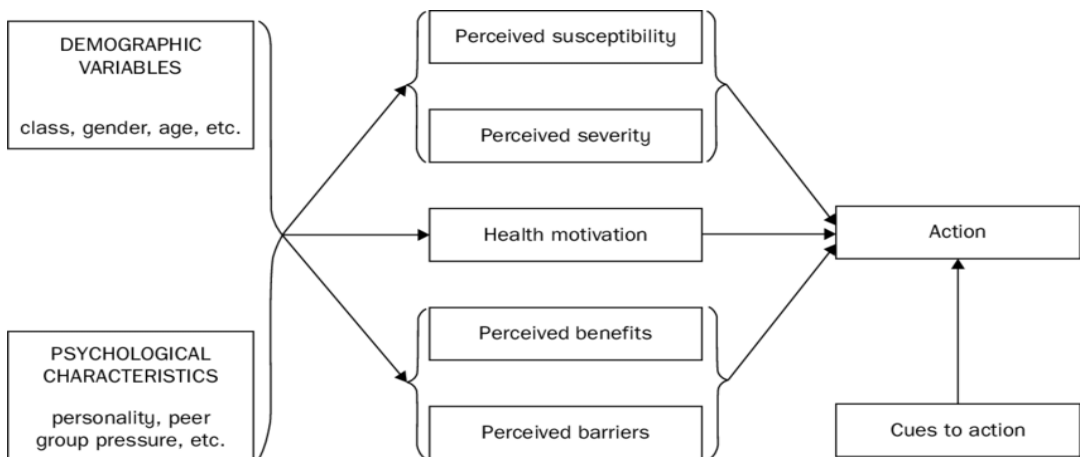
Assistant Lecturer PhD. University of Petroșani, Faculty of Economics, Administrative and Social Sciences, University Street No. 20, Petroșani (Romania)  
Email: cosmin\_sicrea2005@yahoo.com

**Abstract:** *The Health Belief Model (or the model regarding health beliefs) is a theoretical framework used to understand health-related behaviours at the individual level. The model provides direction regarding the behaviour and reactions of the individual when his or her health is at risk and was developed in the 1950s by the psycho-sociologist Irwin Rosenstock, with the aim of explaining and making predictions about health-related behaviours, specifically, preventing diseases or following a medical treatment. The model is based on the idea that people make decisions about their own health-related behaviours based on their perceptions. Thus, the threat of an imminent disease or the benefits of preventing it ( or preventing its risk) often or not end up being associated with preventive actions. Self-medication in Romania is practiced by the general population, who often end up using medicines without a prescription, generally based on their own knowledge, advice from others, or information from various sources, such as the internet or pharmacies. This is a fairly widespread practice in many countries, including Romania, and includes a wide range of treatments, from painkillers and anti-inflammatories to antibiotics or dietary supplements. In Romania, certain medicines can be purchased without a prescription, such as painkillers (e.g. paracetamol, ibuprofen) or cold and flu medicines. Certain antibiotics can also be sold without a prescription, although the law requires them to be available only with a prescription.*

**Keywords:** *self-medication, health belief, behaviours, treatment, disease*

## 1. Health belief conceptual boundaries, general considerations

Health belief is a model that refers to the beliefs and perceptions that a person has about his or her health and the factors that can influence their health status. These beliefs may negatively influence the individual's behaviours regarding the acceptance or rejection of medical treatments, the adoption of preventive behaviours, or the modification of their lifestyle. The model is used mainly in the fields of psychology and public health. Health belief provides a fundamental framework in researching health behaviours. It was conceptualized in the 1950s by the psycho-sociologist Irwin Rosenstock to help understand preventive health behaviour within the United States Public Health Services (USPHS), especially the generalized failure of people to accept prophylactic medications or screening tests for the early detection of asymptomatic diseases (Alyafei, 2025). If we were to restrict the health belief model to a figure, we can present it according to (Sheeran & Abraham 2015) under the following structure (figure 1).



**Figure no. 1 The health belief model (Sheeran & Abraham 2015)**

At the beginning of the development of this model, medical diagnostic tools for diseases such as pulmonary tuberculosis ended up not being used by the population affected by the illness because the symptoms were not correctly identified by them.

Thus, chest X-rays for TB screening were often used late. The model identifies and plans interventions around four main aspects: perception of risk, perceived severity of health condition, perceived benefits of behaviour change, and perceived barriers to action (Green, Murphy, Gryboski, 2020, p. 211). The model emphasizes that people will not act to prevent a negative health outcome if it has an apparently insignificant short-term impact. For example, women will not be interested in undergoing a mammogram unless they are convinced that they may develop breast cancer (Green, Murphy & Gryboski, 2020). Even so, the interaction between health professionals and potential patients may lead to the successful application of the theory. A clear understanding of the causes of behaviour is necessary to be able to make predictions about change. Identifying the cause is also necessary for implementing methods that can influence health behaviours (Davidhizar, 1983).

## **2. Self-medication: from custom to practice among the general population**

Worldwide, over 50% of medicines are prescribed, dispensed or sold inappropriately. Approximately half of people misuse their prescribed medication. Not infrequently, the irrational use of medicines is reflected in the trend of self-medication. Generally speaking, we can define self-medication as “*the administration of medicines, herbs or home remedies to a person on the advice of another person, without consulting a doctor*”.

Self-medication involves the use of medicines by the consumer to treat self-recognized disorders or symptoms and the intermittent or continuous use of a medicine prescribed by a doctor for chronic or recurrent diseases and symptoms. In practice, it is common to use the medicines of family members, especially when treating children or the elderly (Tarciuc et al., 2022). We are now obliged to use the term self-medication with caution. There are situations in which the population can have access to medicines without a medical prescription. Even if in the short term access to certain pharmaceutical products can generate a behaviour that brings “*benefits*” (e.g. rapid access to treatment, low-cost medicines, etc.), the potential risks due to incorrect self-diagnosis or incorrect



choice of therapy that can generate therapeutic failure with serious complications should not be ignored (Brandão et al. 2020).

Since the 1990s, the first reports on the phenomenon of self-medication were made worldwide, and in the 2000s, the World Health Organization (WHO) published a series of guidelines regulating the types of medicines that can be used for self-medication. Economic, political and cultural factors are responsible for the prevalence and increase of self-medication practices worldwide. These factors include: the wide availability of medicines, inappropriate advertising, the level of education in the family, socioeconomic status and access to healthcare services (Tarciuc et al. 2020) .

Family, friends, neighbours, or advertisements can become common sources of “*information*” regarding self-medication. There is a tendency among the population to be independent in the management of diagnostic and treatment activities. The most common self-administered medications identified are: nonsteroidal anti-inflammatory drugs (NSAIDs), analgesics, and antibiotics (Alexa, 2014). The increased availability of information about medications and diseases, especially on the internet, together with an increased interest from the general public, has led to an increase in the practice of self-medication, namely the large number of people who use medications without a medical prescription today (Petrović, 2022). In a study conducted among adolescents in the USA, 22% of them abused and repeatedly consumed analgesics while 14 % did not inform their parents about their use. In the study, the use of analgesics was associated with female gender while a number of other medications, such as vitamins, sports injury medications, anti-allergy medications, and herbal/homeopathic medications were used more by male participants in the study (Shehnaz, Agarwal & Khan, 2014).

Self-medication may have long-term negative effects, especially if practiced frequently or incorrectly. Long-term effects may include: antibiotic resistance, substance dependence, or cumulative side effects. Regular self-medication can lead to delayed medical diagnosis or mistreatment of a condition. For example, symptoms of a serious illness such as cancer or cardiovascular disease can be mistaken for minor ailments, and self-medication treatments can worsen the person's condition. Self-medication without sufficient knowledge can lead to irrational use of medications with serious health effects. Use of medications without medical guidance can lead to pathogen resistance and increased morbidity (Rathod, 2023).

Often misunderstood, self-medication may be considered financially beneficial for the sick person who chooses not to consult a specialist for diagnosis and treatment. Obviously, we should not forget that as the world's population ages, health systems are becoming increasingly concerned with limiting costs. Costs that are often correlated with long waiting lists for medical visits and procedures. So there may be situations in which the concept of “*self-care*” could allow, within certain limits, the management of certain conditions at the person's home. Even if there is a tendency on the part of some governments to encourage self-care for minor illnesses through self-medication, correct information regarding one's own health status is absolutely necessary when we talk about the use of self-medication.

### 3. Self-medication in Romania

According to a 2024 study by Gheorman et al., in Romania self-medication shows significant variations between urban and rural areas. In recent years, the influence of social networks and the Internet has played a significant role in shaping self-medication behaviours. Although these platforms have the potential to increase health awareness and educate individuals, they also spread misinformation, which risk to lead to inappropriate self-treatment. The authors emphasized that it is crucial to implement health education programs, well-targeted public campaigns, and prevention strategies to ensure that self-medication is “practiced” in an informed, safe, and rational manner according to the specific demographic groups in Romania. In the authors' opinion, public education on the benefits and dangers of self-medication should be integrated both into the school curriculum to develop health literacy and through interventions provided by health professionals (Gheorman, 2024). Data from a study conducted in Iași Municipality in 2016 showed that a third of respondents decide to self-administer medications after consulting websites (32%). A quarter of the study participants stated that symptoms such as fever and sore throat (24%) make them resort to self-medication without consulting a specialist. Lack of financial resources and self-administration of anti-inflammatory drugs for pain are found in 35% of the responses (Manole, 2017).

In 2019, a study conducted for the Romanian Association of Non-Prescription Drug Manufacturers (RASCI) highlighted the fact that in the case of minor ailments, the tendency is to use an over-the-counter (OTC) medication. According to the statements of 39% of the subjects, they self-administer medication to relieve symptoms, while 23% of the respondents stated that there were situations in which they used vitamin-based dietary supplements. Of the respondents included in the study, 18% stated that they did not take any measures, but waited for the condition to disappear on its own, while 16% stated that they used “traditional” remedies. According to the data presented in the study, the most common symptoms of the conditions for which Romanians resort to self-medication with non-prescription pharmaceutical products are: colds and flu, headaches, joint and muscle pain, menstrual pain, bloating, abdominal pain. According to the subjects, the doctor remains the main source of information on the correct approach to minor ailments. Most respondents stated that they read the product leaflet. However, not all the information included in the leaflet is of the same level of interest among users, who are mainly interested in the method of administration, dosage and side effects. (Self-medication in Romania, [https://aleginformat.ro/studiu-automedicatia-in-romania/#\\_ftnref1](https://aleginformat.ro/studiu-automedicatia-in-romania/#_ftnref1)). On the other hand, we should not ignore the direct involvement of other health specialists. Thus, the pharmacist can be the health professional who intervenes in preventing the risks generated by self-medication. Taking into account the particularities of the pharmaceutical activity, the pharmacist works on three main therapeutic aspects in his daily practice: information providing, therapeutic advice and health education (Hancu, 2021). Medlife draws attention to the fact that people over 65 years of age who suffer from multiple pathologies such as arthritis, diabetes, hypertension or cardiovascular diseases resort more frequently to this type of medication than young people. Due to the associated pathology, elderly people take several types of medication at the same time (Popescu, 2011 ). Experts warn that when people rely solely on online medical information to self-diagnose or treat themselves, they are putting themselves at risk. They become convinced of their illness and have difficulty accepting a different diagnosis from a doctor.

When referring to the self-medication phenomenon, we should have a correct vision of the drug market as a whole, including the online market. The online drug market is a rapidly growing sector and the development of e-commerce has significantly

influenced the way people purchase drugs through online platforms. Online drug trade creates both opportunities and significant challenges in terms of regulations, safety and consumer protection. In the European Union, the online drug market is regulated quite strictly to protect public health. In Romania, regulations regarding the online sale of drugs are controlled by European and national legislation. At the European level, **the European Union Directive 2001/83/EC** lays down general rules on medicinal products for human use and regulates their sale, including online. According to the directive, prescription-only medicines cannot be sold online, except under certain specific conditions and regulations.

A worrying phenomenon in the field of self-medication, which is gaining momentum, is the use of antibiotics on people's own initiative. According to data provided by the Romanian Society of Microbiology, our country is in the top countries when it comes to this threat, and the trend is worrying. Thus, in the last 10 years there has been an increase in the consumption of broad-spectrum antibiotics, antibiotics with a higher risk of bacterial resistance. Romania, together with Bulgaria and Greece, is in top 3 when it comes to the use of broad-spectrum antibiotics as well as of antimicrobial resistance (AMR) (Romanian Society of Microbiology, Romania - 3rd place in the EU in antibiotic consumption). In 2024, the Ministry of Health was the issuer of Order no.63 of January 10, 2024, which regulates the prescription of antibiotics and antifungals for systemic use. Thus, in the absence of a medical prescription, the Ministry of Health reduces the deadline for emergency situations from 72 to 48 hours. The release of the emergency dose must be followed by the subsequent presentation of the person to the doctor for consultation and obtaining a prescription adapted to their condition (Ministry of Health, 2024).

We should understand that the main determinant of microbial resistance mechanisms, including multidrug resistance, is the repeated use of antibiotics. Bacterial resistance reduces the therapeutic alternatives for infections, more frequently in the case of healthcare-associated infections (HAI), which makes their treatment more difficult and with a risk of unfavorable evolution (National Institute of Public Health, 2022). In such cases, antibacterial, antiparasitic, antiviral and antifungal drugs have become ineffective, making treatment difficult, expensive or even impossible, especially for vulnerable patients, which has led to the prolongation of infectious diseases and an increased mortality rate.

The global extent of the problem, the impact of antimicrobial resistance on human health, the costs of care and the social impact, are still largely unknown (Voidăzan et al. 2019, p.3385). Using the health belief model, we can analyse the tendency of Romanians to resort to self-medication. Traditional beliefs, "miracle" treatments or "recipes" promoted in the online environment can influence the behaviour of the population and the shaping of their own beliefs regarding health or illness. Thus, the cultural context, personal beliefs, and instructions received from loved ones can lead to life-threatening behaviours. The health belief model can be a useful tool for specialists to raise an alarm among the general population regarding the perception of risks and the perception of the seriousness of practicing self-medication.

#### **4. Conclusions and recommendations**

Preventing self-medication is a complex process that involves multiple strategies, both at individual and at collective levels. Public health authorities should conduct information campaigns meant to emphasize the risks of self-medication and the importance of consulting a specialist before administering medications. Regular preventive consultations can help prevent self-medication, as the doctor can diagnose conditions early and provide appropriate treatments. In the case of chronic diseases, careful patient monitoring and treatment adjustment may prevent the tendency to resort

to over-the-counter medications. Self-diagnosis and the abusive use of antibiotics risk to lead to the development of multidrug-resistant bacteria, which makes treatments less effective. These bacteria are the cause of infections that are more difficult to treat, even with powerful antibiotics. Romania, as part of its public health policies, has adopted several national strategies to prevent and combat antimicrobial resistance. These plans include measures to reduce the excessive use of antibiotics, continuous education of health professionals and the promotion of responsible use of antibiotics in hospitals, clinics and pharmacies.

Pharmacists are called to play an essential role in preventing self-medication, providing correct advice and recommendations on the use of medicines and warning patients about the associated risks. Furthermore, it is recommended that pharmacies there is a greater availability of counselling people on the importance of specialized medical consultation.

Stricter legal regulations on the sale of medicines without a prescription may help prevent self-medication by limiting access to substances that risk to be abused. Authorities need to create mechanisms capable of monitoring online sales of medicines to prevent their illegal distribution without a prescription. This may be achieved through stricter rules and regular inspections of online pharmacies. One of the main concerns related to the online market for medicines is the sale of counterfeit or substandard medicines. The online market for medicines has significant potential, but needs to be properly regulated to protect consumers. National and European authorities are responsible for creating a solid legislative framework to ensure the safety and effectiveness of online purchases of medicines, and consumers need to be properly informed to avoid the risks of self-medication or purchasing medicines that can put their lives at risk.

Implementing health and medication educational programs in schools may help young people understand the risks of self-medication and the importance of medical consultation. Workplace education campaigns may help employees adopt healthy behaviours and identify situations in which it is absolutely necessary to consult a doctor, avoiding self-medication. An integrated approach to health, in which the patient benefits from continuous counselling from several professionals (doctors, psychologists, nutritionists, etc.), can help prevent self-medication and substance abuse. On the other hand, raising awareness of the population on possible long-term complications, such as antibiotic resistance or organ damage, when medications are administered incorrectly remains a current goal for health professionals.

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# The Role of Students' Emotional Attachment in Predicting Perceived Teaching Effectiveness

**Maria PESCARU**

Associate Professor Ph.D., National University of Science and Technology Politehnica  
Bucharest, Pitesti University Center (Romania)

Email: [maria.pescaru@upb.ro](mailto:maria.pescaru@upb.ro)

**Mihaela Luminița SANDU**

Lecturer Ph.D., Ovidius University of Constanta (Romania),

Email: [mihaela.sandu@365.univ-ovidius.ro](mailto:mihaela.sandu@365.univ-ovidius.ro)

**Abstract:** *The quality of student-teacher relationships plays a fundamental role in shaping the effectiveness of teaching and the overall learning experience. Traditional research in educational psychology has primarily focused on the cognitive aspects of learning; however, recent studies emphasize the importance of socio-emotional factors in academic success. This study examines the role of student emotional attachment as a predictor of teaching effectiveness, highlighting the importance of teacher-student relational dynamics in promoting engagement and academic performance. Objectives and Hypotheses: The primary objective of this study is to investigate whether students' emotional attachment to their teachers affects their perception of teaching effectiveness. The research hypothesis proposes that a higher level of student attachment to teachers is associated with an increased perception of teaching effectiveness. Methodology: A total of 128 university students participated in this study, completing three standardized psychological scales: the Teacher Attachment Measurement Scale, the Attachment Style Questionnaire (Collins & Read, 1990), and the Scale for the Evaluation of Teacher Effectiveness in Higher Education (Calaguas, 2020). Data analysis was conducted using Pearson correlation and linear regression models to examine the relationship between emotional attachment and perceived teaching effectiveness. Results: The findings indicate a strong and statistically significant positive correlation between attachment to the teacher and perceived teaching effectiveness ( $r = 0.668$ ,  $p < 0.001$ ). Additionally, regression analysis reveals that 44.6% of the variation in teaching effectiveness can be attributed to the level of student attachment to the teacher. These results suggest that students who develop a secure and positive relationship with their teachers are more likely to perceive them as effective educators. Conclusions: This study highlights the significance of emotional connections in the educational process, demonstrating that a strong teacher-student bond significantly enhances teaching effectiveness. The findings have practical implications for educational policies and teacher training, underscoring the importance of fostering supportive and trust-based relationships in the classroom. Future research should explore how teacher behaviors and institutional support further contribute to strengthening student attachment and engagement in learning environments.*

**Keywords:** *emotional attachment; teaching effectiveness; student-teacher relationship; academic engagement; educational psychology; attachment theory; student motivation; learning outcomes.*

## 1. Introduction

In the traditional research framework of educational psychology, the focus is on studying the cognitive aspects of learning, teaching, and student-teacher interaction. A growing number of studies emphasize the significance of students' socio-emotional well-being in the school environment and the quality of interaction between students and teachers for successful school adaptation, learning, and academic achievement. This paper examines the importance of the socio-emotional relationship between students and teachers from the perspective of attachment theory. The central idea of this research is that students' attachment to teachers is a predictor of teacher effectiveness.

Rogers (1990: 304–311), the founder of the person-centered approach to teaching, has provided considerable empirical support for the thesis that teacher-student relationships are fundamental in understanding the behavior of both teachers and students in the classroom, directly influencing students' academic outcomes (Riley, 2010, p. 191). His work has been confirmed in numerous other studies (Lewis, 2001: 307–319, 2006: 1193–1214, 2008: 341), including a recent meta-analysis of 119 studies involving 355,325 students from 1948 to 2004 (Calucag: 2016: 100-107).

There is no human being who is entirely unique and independent of others. Each personality represents its universe, composed of multiple influences and continuous interactions with others. This self... It is a composite structure comprising numerous influences and countless exchanges between us and others. These other people are, in fact, an integral part of our own identity... we are interconnected and interdependent (Riviere, 1955, p. 189).

## **2. Conceptualization of terms**

### *a. Didactic effectiveness*

Regarding the effectiveness of the teacher, in a broad sense, this term is used to designate the collection of characteristics, competencies and behaviors of teachers at all educational levels that allow students to achieve the desired results" (Hunt, 2009, pp. 11-30). Awofala (2012: 33-44) argues that teacher effectiveness is equivalent to individual teacher performance and that "it is contained in knowledge, attitudes, and performance" (Hunt, 2009, pp. 11-30). Moreover, teacher effectiveness is essential because it represents "the life of every educational institution" (Rao and Kumar, 2004: 4). In particular, teacher characteristics are one of the factors influencing teachers' overall effectiveness (Anderson, 2004: 122-131, Pagani and Seghieri, 2002: 197-208) these are "relatively stable traits that are related to and influence the way teachers practice their profession" (Anderson, 2004, pp. 122-131).

Suditu (2014: 53–59) argues that a teacher's upbeat personality contributes to the effectiveness of teaching. Moreover, the effectiveness of teaching is accepted by students when teachers teach with enthusiasm, stimulate their curiosity with challenging questions, and connect with them by selecting activities that engage students to increase their well-being. Additionally, a study conducted among university students from various scientific and technical fields in Romania found that students become more engaged when the lecturer presents a pleasant personality (Suditu, 2014, pp. 53–59). This study concluded that the upbeat personality of teachers contributes to the effectiveness of the learning process. It is essential to examine how the quality of teachers with extroverted personality traits influences the effectiveness of the teaching process in the classroom, in contrast to teachers with neurotic personality traits, who can have a negative impact on teaching (Aydin et al., 2013, pp. 575-586).

The manner and pattern of interactions with students clearly show the effectiveness in promoting learning and self-esteem (Calucag, 2016, pp. 100-107). Teachers are often unaware of how their beliefs about teaching and learning influence all their decisions in the classroom; however, there is considerable evidence that teachers are the most significant factor influencing student achievement (Calucag, 2016, pp. 100-107).

### *b. Student attachment*

Understanding attachment theory, particularly adult attachment theory, significantly alters the perspective on all relationships within the school environment. Recent developments in the study of attachment in adults have expanded the understanding of attachment processes beyond childhood, addressing the concept of



mutual or dyadic attachment. A fundamental premise is that the teacher-student relationship, in terms of attachment, is dyadic and not unidirectional.

Attachment theory is a homeostatic theory designed to regulate emotional distance and a sense of security, in which individuals strive to remain close enough to feel comfortable. Similar to how bodily functions, such as regulating temperature or blood pressure, are kept within appropriate limits to ensure good health, attachment is a system of regulating 'distance or accessibility' from clearly identified people, maintained by behavioral means rather than physiological means" (Bowlby, 1988a, pp. 27- 29).

Attachment is the emotional bond that a person develops with an individual perceived as more capable of coping with the world (Bowlby, 1988a, pp. 27-29). In the educational context, the student's attachment to the teacher reflects the connection felt by the student, based on the belief that the teacher is more capable of supporting them in adapting to the professional environment through the transfer of information, knowledge, and skills.

The way teachers establish and maintain relationships within the classroom is essential for the success of educational work. A teacher who can accurately interpret fundamental relational processes has the opportunity to influence classroom dynamics proactively rather than reactively (Riley, 2010, p. 191).

Within an attachment dyad, such as the one between teacher and student, separations are inevitable, being a natural consequence of the educational system's organization. These include intervals such as school hours, weekends, and holidays, which are not under the control of either the teacher or the student. Each separation can trigger separation anxiety, while each reunion constitutes an opportunity for a corrective or confirmatory emotional experience.

The application of attachment theory to the teacher-student relationship offers a new perspective on these interactions. Kesner (2000: 133–149) notes that although all attachment relationships involve emotional closeness, not all close relationships are necessarily attachment relationships. He recalls that Bowlby (1984: 47-63) pointed out that attachments can also be formed toward other significant adults, not just parents, noting that "perhaps there is no other non-family adult more significant in a child's life than his teacher" (Kesner, 2000, pp. 133–149).

The strong bond of attachment that some students develop towards their teacher, seen as a significant "other" in their lives, is reciprocated by the teacher. Hrdy (2009: 232) illustrates this concept with the term "allomothers", referring to individuals who share the responsibility of caring for children in approximately half of primate species, including humans. However, this relationship of mutual attachment implies that the teacher also has needs within this interaction. The mutual attachment between teacher and student, known as "allotment," has a distinctive character in the school environment. In addition, the teacher requires students to exhibit a certain level of dependency in order to build and maintain their professional identity; there can be no teacher without students, just as there can be no leader without disciples.

The teacher requires at least one student to form a working relationship that maintains his professional identity. A professional identity cannot exist in the absence of a student and the specific relationship between them. However, this dyad is not straightforward due to the unequal distribution of power between roles and responsibilities that are not equally shared in the teacher-student relationship. This aspect highlights the unique nature of the teacher-student relationship.

Another aspect specific to this dyad is that, although the teacher depends on the relationship with the students to maintain his professional identity, the reciprocal is not valid for the students. This turns the teacher into a caregiver for the students, placing the

student in the role of caregiver, a role that some students may not be ready or willing to fulfill. The student can exist and learn independently of the presence of a teacher. A significant part of teachers' work is to become redundant by training active, independent, and resourceful students who thrive autonomously. However, this process involves an implicit separation from the student, which the teacher may find challenging to accept.

The teacher-student relationship forms the basis of the teacher's professional identity, the student's learning identity, and a professional working relationship for both. Viewed through the lens of adult attachment, this relationship empowers students through unconscious yet meaningful processes. For example, an altercation between the teacher and a problematic student, whom her classmates appreciate, can be perceived by the teacher as a threat to the proximity to the entire group, thereby increasing the anxiety of separation from the object of attachment, the class. This anxiety can trigger attachment behaviors, including anger and protests, to prevent perceived distancing. Thus, the roles of caregiver and care seeker are assumed by both parties in the classroom.

In addition to their role as caregivers, teachers also assume the role of caregivers for their students, carrying both legal and moral responsibilities towards them. His age, experience, and authoritarian position contribute to this double hypostasis, which complicates the behavioral attachment system, influencing the interactions between teacher and student within the classroom.

Another important aspect of dyadic attachment theory, relevant to the analysis of relationships in the classroom, is the definition of the dyad in the context of a teacher interacting with several students simultaneously. The question arises as to whether the teacher forms a separate dyad with each student or whether there is an attachment system that works at the group level. The answer seems to be that both forms coexist. In a classroom, there are multiple dyads: the individual relationships between the teacher and each student, the interactions between the students, and the connection between the teacher and the group of students as a whole.

Loughran (2006: 211-226) subliniază că legătura dintre teorie și practică în educație este influențată de diferențele de abordare dintre cercetători și profesori. În timp ce cercetătorii tind să analizeze relațiile educaționale la nivel individual, profesorii privesc frecvent clasa ca pe o entitate colectivă, deoarece gestionarea eficientă a grupului este o condiție prealabilă pentru satisfacerea nevoilor fiecărui elev în parte. Acest aspect este esențial pentru a înțelege modul în care profesorii percep atât dinamica de ansamblu a clasei, cât și relațiile individuale cu elevii.

Often, teachers refer to their classes as collective entities, but they use language that also suggests the individuality of the members. Phrases such as "I have 8F this afternoon" or "I like this year's class" indicate an internal working model in which the classroom is perceived as a whole, with each student representing an element of the collective identity.

### **3. Research Methodology**

#### **3.1. Objective**

This study aims to examine the extent to which student emotional attachment can predict teaching effectiveness.

### 3.2. Hypothesis

**Hypothesis:** The student's attachment to the teacher is presumed to be a predictor of teacher effectiveness.

### 3.3. Study participants

This study targets young people, both men and women, who are students. The research sample comprises 128 students from various universities and faculties, of whom 65 are enrolled in Theology. The gender distribution includes 90 male participants and 38 female participants.

### 3.4. Research tools

To investigate the predictability of teaching efficiency about student attachment, three psychological questionnaires were administered to research participants in electronic format using Google Forms.

Teaching effectiveness was assessed using *the Scale for the Evaluation of Teacher Effectiveness in Higher Education (Calaguas C.M.'s Questionnaire, 2020)*, a questionnaire consisting of 4 subscales each analyzing one dimension, as follows: 45 items - Teaching-related behaviors, 10 items - Experience in the field, seven items - Relational experience & 5 items - personality, thus totaling a total number of 67 items.

For the Student's Attachment, the following instruments were used: the Teacher Attachment Measurement Scale, a 5-item questionnaire, and the Attachment Style Questionnaire (ASQ), developed by Collins and Read in 1990. This 18-item questionnaire includes six items for each attachment style.

For all three questionnaires, respondents chose the extent to which they approved or rejected the statements contained in the items at the time of testing.

### 3.5. Analysis and interpretation of results

To validate the hypothesis of this study, statistical analysis of the data obtained from scoring the participants' responses was performed using the IBM SPSS application. After checking and cleaning the data, a normality test was applied to determine the appropriate method of analysis, either parametric or nonparametric.

The results of the Kolmogorov-Smirnov test indicated the following values: Attachment to the teacher ( $p = .001$ ), Secure attachment ( $p = .007$ ), Avoidant attachment ( $p = .0004$ ), Anxious attachment ( $p = .008$ ) and Teaching effectiveness ( $p = .000$ ), all values being less than .005, which justifies the use of the parametric method for correlation, in this case the Pearson correlation coefficient.

Following the application of this correlation test, the following results were obtained:

**Table 1. Pearson coefficient for the correlation between Attachment to the teacher and teaching effectiveness**

		Atasament professor	Teaching effectiveness
Spearman's rho	Correlation	1,000	,668**
	Coefficient		
	Sig. (2-tailed)	.	,000
	N	128	128
	Correlation	,668**	1,000
	Coefficient		
Teaching effectiveness	Sig. (2-tailed)	,000	.
	N	128	128

\*\* . Correlation is significant at the 0.01 level (2-tailed).

The results of the Pearson correlation analysis indicate a strong and statistically significant positive relationship between attachment to the teacher and teaching effectiveness ( $r = .668$ ,  $p < .001$ ). This coefficient suggests that as the student's level of emotional attachment to the teacher increases, the perception of teaching effectiveness also tends to be higher.

This result supports the theory that interpersonal relationships between students and teachers play an essential role in the learning process. A teacher perceived as accessible, supportive, and involved can facilitate not only the transfer of knowledge but also the student's motivation, commitment, and confidence in the educational process. Attachment to the teacher thus functions as a protective factor, reducing academic anxiety and increasing the feeling of security in the educational environment, which contributes to greater receptivity and efficiency in learning.

The interpretation of these data underscores the significance of positive relationships between teachers and students in fostering a supportive learning environment. Teachers who manage to cultivate a climate based on trust and emotional support not only improve the educational experience of students but can also directly influence their perception of teaching skills and effectiveness. Thus, the results suggest that investing in the development of positive teacher-student relationships can be a valuable strategy for enhancing the educational process and improving academic performance.

**Table 2. Predictability coefficient of Teaching Effectiveness through Attachment to the teacher**

Model Summary <sup>b</sup>					
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate	Durbin-Watson
1	.668 <sup>a</sup>	.446	.442	29.764	1.669

a. Predictors: (Constant), At\_Prof

b. Dependent Variable: EficTotal

The results of linear regression indicate that attachment to the teacher is a significant predictor of teaching effectiveness. The correlation coefficient,  $R = 0.668$ , suggests a strong relationship between the two variables, while the coefficient  $R^2 = 0.446$  indicates that 44.6% of the variation in teaching effectiveness can be explained by attachment to the teacher. In other words, almost half of the perception of teacher effectiveness is influenced by the emotional relationship between the student and the teacher.

The value of Adjusted R-squared = 0.442 confirms the stability of this model, suggesting that if we were to apply the analysis to another similar sample, the results would remain relatively constant. The standard error of the estimate (29,764) indicates the degree of variation in individual scores relative to the prediction model, providing a measure of the prediction's accuracy.

These results emphasize the importance of interpersonal relationships in academia. Students who develop a stronger attachment to the teacher tend to perceive the educational process as more effective, which can lead to greater engagement, increased motivation, and a more positive learning experience. The teacher-student relationship not only influences the emotional climate of the class but also has a direct impact on how students evaluate the teacher's competencies and the quality of teaching.

The Durbin-Watson value (1.669) indicates a low autocorrelation of errors in the model, suggesting that the data are independent and that the regression model is valid. Thus, these results confirm that the development of positive relationships between teachers and students not only enhances the educational experience but can also become an essential factor in optimizing teaching effectiveness.

**Table 3. Predictability coefficient of Teaching Effectiveness through Attachment to the teacher**

**Coefficients<sup>a</sup>**

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
1 (Constant)	154.782	13.695		11.302	.000
At_Prof	8.893	.883	.668	10.070	.000

a. Dependent Variable: EficTotal

The results of linear regression highlight the fact that attachment to the teacher is a significant predictor of teaching effectiveness. The value  $B = 8,893$  for the Attachment to the teacher variable indicates that, for each unit of attachment growth to the teacher, the teaching effectiveness score increases, on average, by 8,893 points, keeping the other variables constant.

The standardized Beta coefficient (.668) confirms a strong relationship between the two variables, emphasizing that the student's attachment to the teacher plays a crucial role in their perception of the effectiveness of the teaching act. The high value of the t-test (10.070,  $p < .001$ ) indicates that this predictor is highly statistically significant, meaning that the probability that this relationship is the result of chance is extremely low.

This data reinforces the idea that a teacher who can create a positive emotional connection with their students will be perceived as more effective. Attachment to the

teacher not only influences the educational climate but can also play a central role in the student's motivation, involvement, and confidence in the learning process. The attachment relationship provides a sense of security and support, which can reduce academic stress and improve responsiveness to the teaching process.

In addition, the intercept value ( $B = 154,782$ ) suggests that, in the absence of attachment to the teacher, teaching effectiveness would still have a positive score, which may indicate that other factors contribute to this perception. However, emotional attachment plays a central role.

Thus, the results suggest that teachers who invest in positive relationships with their students can directly influence not only the classroom climate but also the way students perceive and evaluate the teaching act, which can lead to a more effective and satisfying educational experience.

### 3.6. Discussions

The results obtained in this study confirm the hypothesis that students' emotional attachment to their teacher is a significant predictor of teaching effectiveness. The Pearson correlation analysis revealed a strong positive relationship between these two variables ( $r = 0.668$ ,  $p < 0.001$ ), indicating that as students' level of attachment to the teacher increases, their perception of teaching effectiveness also becomes more favorable. This finding is also supported by linear regression analysis, which shows that 44.6% of the variation in teaching effectiveness can be explained by attachment to the teacher ( $R^2 = .446$ ), demonstrating the significant impact of this variable on the educational experience of students.

These results highlight the importance of interpersonal relationships in the learning process and support attachment theories, which suggest that positive interactions between students and teachers can contribute to a favorable educational climate. A secure attachment to the teacher can provide students with a sense of emotional security, reducing academic anxiety and increasing engagement in learning activities. This result is consistent with previous studies that have emphasized the significance of emotional support in the educational context and its impact on motivation and academic performance (Kesner, 2000, pp. 133-149; Riley, 2010: 191).

The interpretation of the regression coefficients reveals that a one-unit increase in the teacher-to-teacher attachment score is associated with an average increase of 8,893 points in the perceived teaching effectiveness score. This result highlights the fact that students who perceive the teacher as accessible, supportive, and involved in their educational process tend to evaluate him as more effective. In addition, the Durbin-Watson value (1,669) confirms the independence of the model's errors, suggesting good statistical validity of the results.

From an applicative perspective, these findings suggest that teachers who invest in developing positive relationships with their students can not only improve the educational climate but also enhance their perception of their teaching skills. Creating an educational environment based on emotional support, open communication, and accessibility can contribute to more effective and deeper learning. Thus, teacher training programs could include specific strategies for strengthening teacher-student relationships, given the significant impact this has on perceptions of teaching effectiveness.

A possible limitation of the study is that the data was collected exclusively through self-reporting, which can introduce a certain degree of subjectivity into the students' assessments. Further exploration of other variables that could influence teaching effectiveness, such as teaching methods, the teacher's communication style, or

the student's intrinsic motivation, is also needed. Future studies could also examine the long-term dynamics of the teacher-student relationship, investigating how attachment influences academic performance and overall satisfaction with the educational experience.

In conclusion, the results of this study underscore the significance of interpersonal relationships in the educational process and highlight the fact that a student's emotional attachment to their teacher is a substantial predictor of teaching effectiveness. These findings offer valuable insights for enhancing pedagogical practices and fostering an academic environment that promotes educational success.

### **Conclusions**

The results of this study confirm that students' emotional attachment to their teachers is a significant predictor of teaching effectiveness, thus highlighting the importance of interpersonal relationships in the educational environment. The Pearson correlation analysis revealed a strong positive relationship between the two variables ( $r = .668$ ,  $p < .001$ ), and linear regression showed that 44.6% of the variation in teaching effectiveness could be explained by attachment to the teacher. These results suggest that students' perceptions of the teacher's teaching competencies are closely related to the emotional connection and sense of security that the teacher provides.

These findings support attachment theories that emphasize the impact of supportive relationships in the learning process. Students who develop a secure attachment to their teacher are more motivated, more involved, and have a more positive perception of the educational process's effectiveness. This suggests that teachers who invest in fostering trusting relationships with students can positively influence not only the motivation and climate of the class but also its long-term academic outcomes.

The results of this study have important implications for educational practice. Developing teaching strategies that foster positive teacher-student relationships, effective communication, and emotional support can significantly enhance students' learning experiences. Thus, teacher training programs should include dimensions focused on emotional intelligence, interpersonal communication techniques, and educational relationship management.

A possible limitation of the study is the reliance on a method based exclusively on self-reporting, which may introduce a degree of subjectivity in evaluating teaching effectiveness. Future studies could expand this research by including other variables, such as the teacher's teaching style, the student's level of motivation, or objectively measured academic performance. A longitudinal analysis would also be beneficial to explore how teacher-student relationships evolve and influence students' educational paths.

In conclusion, the results of this study demonstrate that emotional attachment to the teacher is a crucial factor in perceiving teaching effectiveness, providing new insights into the importance of interpersonal relationships in education. By fostering an educational climate built on trust, support, and emotional connection, teachers can make a significant contribution to enhancing the academic experience and optimizing the learning process.

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## **Book Review: Bogdan Nicolae Mucea (2023), *Ocupații, angajament organizațional și resurse umane. O altă perspectivă de abordare*, Tritonic, București, 164 p.**

**Marius Sabin MORAR**

MA, Student “1 Decembrie 1918” University of Alba Iulia; Research Centre for Social Development and Human Resources (România)  
Email: mariusmorars@yahoo.com



The author of this book, Bogdan Nicolae Mucea PhD, is a university lecturer in the Department of Social Sciences within the Faculty of Law and Social Sciences. He combines his academic duties with research in sociology, labour sociology, and human resources, drawing upon extensive expertise in the analysis of organisational commitment and the dynamics of modern occupations. He has conducted numerous specialised studies in the field of occupational sociology, human resources, and labour sociology. Some of the findings of these research endeavours have been compiled in the book called Professional Occupations, Organisational Commitment and Human Resources: An Alternative Approach. This volume incorporates various studies presented at scientific events and

partially published in scholarly journals in recent years.

In this volume, Mucea delves into the intricate relationships between employees and organisations, focusing on organisational commitment and transformations within human resources. The book is structured into two distinct sections, A and B, beginning with a theoretical overview of the concept of organisational commitment and its dimensions, as formulated by Allen and Meyer in the 1990s. This section is followed by an analysis of the author's own research aimed at reinforcing established theories centred on organisational commitment. The presented case studies, particularly two longitudinal analyses: one on former employees of Roșia Montană Gold Corporation (RMGC) and another on the first cohort of students from the dual vocational school in Alba County, class of 2021, are valuable for the volume. The author employs a diverse methodology, integrating qualitative and quantitative perspectives to capture the complexity of factors influencing individuals' perceptions and professional dynamics. The book presents sociological research findings that are particularly beneficial for students studying sociology and human resources, providing a foundational understanding of key concepts. The descriptive analyses serve as a starting point for future generations of researchers.

The first section of the book focuses on organisational commitment, encompassing both theoretical studies and the author's own research on employees in the mining sector, particularly former RMGC employees. The author investigates aspects such as attitudes towards work post-dismissal, the implications of economic restructuring and perceptions of the Roșia Montană mining project. This section also explores the dimensions of organisational commitment, following Allen and Meyer's theory, paying

particular attention to affective commitment (emotional attachment to the organisation), continuity (perceived costs of leaving the job) and normative commitment (a sense of obligation towards the employer). These concepts are applied specifically to the case of Roșia Montană, highlighting the peculiarities of the mining industry and the challenges faced by the workforce due to structural transformations in Romanian society. Additionally, the book presents the findings of longitudinal studies on the organisational commitment of former RMGC employees, conducted in 2015, 2016 and 2019, followed by the social implications of RMGC's restructuring and the closure of the mining project, including effects on the local community and individual perceptions of corporate responsibility and economic policies. The study highlights extrinsic factors that have hindered former RMGC employees and local residents in redefining their economic and professional outlooks.

This section also includes an analysis of the 2012 county-wide referendum on the resumption of mining activities in Roșia Montană. After outlining the context and the way the referendum was organised, the author presents the voting results and offers potential reasons for the referendum's invalidation due to lack of quorum. Special emphasis is placed on the concentric circles model as a primary explanatory factor, alongside the socio-economic status of the localities involved in the referendum.

The second section of the book presents two case studies focusing on adolescents' occupational choices and the causal factors influencing career decisions and school selection after completing secondary education. One of these studies examines a longitudinal analysis of a generation of students from the first dual vocational school in Alba Iulia, exploring students' career perceptions and their labour market integration after graduation. This investigation is particularly noteworthy because the data was collected from students who conducted their studies during the COVID-19 pandemic. The analysis examines factors influencing career choices and the challenges young people faced while entering the labour market. Given that the study period coincided with the pandemic and online schooling, it also captures additional labour market shifts and students' evolving perceptions of education, careers, and employment prospects. The study's insights into post-pandemic occupational choices contribute significantly to understanding generational shifts in students' attitudes. Furthermore, the author addresses generational differences in the workforce and their impact on organisational environments. While the analysis in this section is primarily descriptive, the findings provide a foundation for future studies on students' perspectives regarding vocational counselling, education, and the labour market.

The final chapter briefly outlines the key characteristics of the workforce generations that are currently active in the labour market, from Baby Boomers to Generation Z, including short references to relevant theoretical perspectives.

Published in 2023, this volume includes a bibliography formatted in APA style and includes an annex section at its very end. The annexes contain four detailed appendices featuring extended data from the studies presented in the book.



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DOAJ - Directory of Open Access Journals, UlrichsWeb, EBSCOHost,

CEEOL - Central and Eastern European Online Library, Index Copernicus,

RePEc - Economics and Finance Research, HeinOnline, CiteFactor, Ideas, Citec, LogEc,

DRJI - Directory of Research Journal Indexing, SafetyLit, WorldCat, Wilson College Library, ORCID,

ROAD - Directory of Open Access Scholarly Resources, Genamics JournalSeek, Wissenschaftszentrum Berlin für Sozialforschung, NewJour-Georgetown Library,

GIGA-German Institute of Global and Area Studies - Information Centre.

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