

UNIVERSITY JOURNAL OF SOCIOLOGY

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# REVISTA UNIVERSITARĂ DE SOCIOLOGIE



Year XXI - no. 3/2025

REVUE UNIVERSITAIRE DE SOCIOLOGIE

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## **A Comprehensive Lecture On The Evolution Of Sociology: From Its Inception To Contemporary Developments**

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### **Abstract:**

This paper develops an extended theoretical discussion based on an excerpt from a chapter in the volume authored by J. P. Gibbs and E. Sheldon, *Science and Sociology: Predictive Power Is the Name of the Game* (2018). Starting from their critical diagnosis, the article addresses the long-term evolution of sociology as a scientific discipline, from its foundational aspirations toward explanatory and predictive rigor to its contemporary methodological and epistemological fragmentation. Gibbs and Sheldon argue that, in recent decades, sociology has progressively distanced itself from the standards of cumulative scientific knowledge, increasingly privileging localized assessments of social realities grounded in demographic analyses, survey-based research, and ethnographic descriptions, often at the expense of generalization and predictive capacity.

Building on this argument, the present paper situates sociology within its broader historical and intellectual trajectory, highlighting key moments in its development, major theoretical paradigms, and recurrent tensions between explanation, interpretation, and application. Particular attention is given to the comparison between sociological reasoning and epistemological models derived from the natural sciences, especially with regard to prediction, falsifiability, and theory-driven research. By examining selected empirical situations and conceptual analogies drawn from the natural sciences, the paper explores the extent to which sociology can reclaim or reformulate its scientific ambitions without disregarding the complexity and contextuality of social phenomena.

**Keywords:** *sociology, societies, science, researchers, knowledge*

### **I. Introduction**

Positivist sociology, established by Auguste Comte, aimed to emulate the empirical natural sciences by adopting their methods and using them to study social phenomena and human behavior. Durkheim strengthened this perspective by contending that social reality is perceived through our senses, but it exists outside of human consciousness. It possesses objectivity, is situated within the system, follows unchangeable laws of nature, and can be grasped through empirical knowledge. Every

individual in the society has a similar understanding of reality as they all have common meanings (Sarantacos, 1998: 36).

In a different context and beyond the functionalism, these meanings remain constant and motivate social actors to maintain the social order through an unspoken agreement.

Regarding human presence, humans are rational individuals who are guided by social norms; their behavior is acquired through observation and controlled by external factors that yield the same results (identical causes lead to identical outcomes).

The positivist approach is manifested in the paradigm of social facts, which encompasses a range of theories, including functionalism. Those who adhere to this model focus not only on social phenomena but also on their effects on human thinking and actions (Ritzer, 2011: 11).

The deductive method is central to the analysis of positivist sociology and nomothetic legal theories. It rejects the rhetoric of common sense, the researcher must use objective rigor to arrive at causal laws for him.

Conversely, within non-positivist sociology, multiple currents and theoretical frameworks emphasize interpretation and the construction of meaning. For instance, ethnomethodology and symbolic interactionism adopt a formative epistemology, rejecting structuralist models. Instead, they center on discourse and interaction in everyday life, emphasizing individual agency and distancing themselves from the influence of social structures and their coercive power.

In the 1960, a reevaluation of sociological theories and their intellectual and political frameworks took place due to the epistemological and methodological conflict between the dualities of structure and action, quantitative and qualitative, objective and subjective. A. Gouldner, in his book "The Coming Crisis of Western Sociology" (1970), argues that it is currently impossible to consider the intellectual field of society as a logically coherent and universally accepted entity by the scientific community.

In his book "Science and Sociology", Gibbs J.P., known as such in the United States, argues that sociology has undergone a shift in recent decades, becoming less scientific and more focused on subjective evaluations, oversimplification, and even irony. The sociological project has emphasized the potential for promoting social change, aiming to create a positive impact on the world, while overlooking the underlying moral presumption of this pursuit and implying that sociologists possess the knowledge to alter society.

The subtitle of his book, "Predictive power is the name of the Game," implies the need to revisit the roots of positivist sociology in order to establish it as a legitimate science. This is because all sciences are validated by their capacity to predict and uncover the truth. However, the question remains: can sociology achieve this?

The experience of societies under totalitarian regimes provides a relevant empirical ground for reflecting on the relationship between structural constraint and the internalization of social norms. Studies on everyday life in communist Romania

highlight how social reality was organized through a complex set of institutional, symbolic, and discursive mechanisms that generated both behavioral conformity and informal adaptations at the micro-social level (Cioacă, 2019). In this context, “social facts” were manifested not only as explicit rules or visible institutions but also as internalized everyday practices, routines, and survival strategies developed by individuals in response to systemic constraints. The sociological analysis of daily life under communism thus demonstrates that the objectivity of social structures does not exclude subjective interpretation; rather, it implies a complex relationship between structural determination and individual agency. Such empirical examples support the idea that sociology must combine explanatory approaches oriented toward regularities with interpretive analyses of the meanings constructed by social actors, particularly in historical contexts shaped by ideology and extensive social control.

## **2. Assertion is not facts**

In the introduction, we discussed the social fact model, which draws inspiration from Durkheim's *rese arch*. This model serves to establish sociology as a scientific discipline by utilizing a series of categories that shape cognitive frameworks. These categories and structures are social facts, and within the realm of scientific activities, the proposition that sociology should examine and analyze them is a scientific claim, made with the understanding that it will be evaluated based on the data gathered to determine its ability to make accurate predictions for researchers. L. Fleck asserts that facts should be regarded as something specific, immutable, and separate from scientists' personal interpretation (Fleck, 1979: 98).

When conducting such assessments, researchers must connect their definitions to the data they collect in order to evaluate the claims. Following Ekland and Gibbs (p. 04), this process manifests as epistemic statements—cognitive expressions that encode knowledge claims about the data and their relationship to the phenomena under study.

Regarding K. Cetina (1999), the conventional definition of the knowledge society emphasizes knowledge and perceives it as information about scientific beliefs, technological applications, or possibly intellectual property. The idea being defended here is the alteration of emphasis on knowledge within structures, processes, and environments that shape specific cognitive frameworks (Cetina, 1999: 8). This refers to how this knowledge is generated in specific contexts controlled by cultural understandings.

The positivist school has always emphasized the remarkable achievements of the natural sciences in aligning with the social division of labor, and it is undeniable that this assertion holds true. However, this social division could not exist without the material production linked to the bourgeoisie (Adorno, 2000: 100).

This goes against Gibbs' claim that the notion of science having an ideological bias is unfounded (Ekland and Gibbs, p xi), as science is meant to be impartial and rely on scientific methods to analyze and explain reality. However, can sociology achieve the same level of objectivity?

H.S. Becker, in an interview, confesses that the researcher cannot separate his political beliefs from his sociological work, thereby raising the fundamental question of whose side we are on? (Becker, 2014: 41). To address this issue, one strategy is to associate ourselves with specific groups, even if we may not initially desire to, such as minorities, gangs, the mentally ill, or stigmatized individuals. By doing so, we can be categorized within a particular group that may ultimately serve the interests of others.

### **3. What about the danger of sociology?**

In his book "Le Danger Sociologique 2018," French sociologist G. Bronner explores the precarious state of sociology. He highlights the scientific deviation and lack of commitment to a rigorous methodology among certain sociologists, resulting in the decline of sociology and its scientific credibility. N. Henrich, in an interview, argued that critical sociology, which originated from the German Frankfurt School and included the work of Bourdieu, is no longer relevant due to the presence of unjustified ideologies that hinder scientific thinking.

While presenting research and studies, it is now possible to have different methodological and epistemological perspectives. However, it is crucial to avoid making biased judgments about the unscientific nature of sociology solely based on our own ideology or position, as this would render science stagnant. We can vividly recall the wise words of philosopher of science Ferdinand P. Feyerabend, author of the book "Against Method," when he states that scientific progress would not have been possible if some researchers had not deliberately or inadvertently broken methodological frameworks (Feyerabend, 1993: 132).

We see a sociological danger in the prevailing cognitive code influenced by currents like postmodernism. This code is further strengthened by scientific journals and a group of researchers who impose restrictions on knowledge production, rendering science sterile. These individuals can be referred to as the guardians of the temple. Their goal is to impose strict limits on knowledge production through institutionalized practices, and Feyerabend's idea of breaking these frameworks applies to not only physics but also the humanities and social sciences.

The foundation of Brunner can be traced back to Elisabeth E. Teissier, who defended her doctoral thesis on horoscopes and astrology under the guidance of French sociologist Mafessoli M.

Accepting this work, which is unrelated to sociology, drew criticism towards him. Next, an anonymous sociologist attempted to submit an article to *Société* magazine, which happened to be edited by the same sociologist. The article was about L'autolib, a complimentary delivery service in Paris. The authors of the article made an effort to transition from modernist to postmodernist knowledge. However, they later revealed that the article was actually a deliberate hoax aimed at exposing the flaws in the field of sociology and the tendency of some academic journals to publish anything under the guise of science. Undoubtedly, this wasn't the first instance. In 1994, physicist Sokal A submitted an article to an American journal called *Social Text*. The article, titled "Transgressing the Boundaries: Toward a Transformative

Hermeneutics of Quantum Gravity," was filled with scientific concepts and quotes from postmodernists. This gave the impression that Sokal was aligned with postmodernism, particularly the relativist movement linked to cultural studies. Sokal exposed the article as a hoax after it was published, citing his intention to challenge his leftist peers who doubted the reliability of the idea of reality as perceived by relativity, asserting that only physics had the capacity to address this.

According to Sokal's previous article, he argues that Western scientific practices expose the influence of ideology behind the illusion of objectivity. It has become more evident that physical reality is not separate from social reality, but rather influenced by linguistic and social constructs (Sokal, 1996: 85).

The discourse mentioned here is commonly found in postmodernist writings, and it goes against the objective nature of science. As Sokal explains in his book "Impostures intellectuelles," this discourse is prevalent in statements that are intentionally ambiguous. For centuries, magicians, fortune tellers, and priests have used equations, unknown languages, and symbols to manipulate and deceive others, concealing the irrationality of their speech (Sokal and Bricmont, 1994: 13).

Criminologist Taylor argues that the dismantling theory has the potential to compete with and challenge traditional theories, but it has not been truly successful in providing effective and viable alternatives in the field of crime control and prevention. Some critics believe that postmodern criminology is nothing more than a set of ideas about social reality, rather than a good or understandable theory. (Morisson, 1995: 65)

Due to its inherent vagueness, the term "objectivity" lacks sufficient empirical evidence and practicality. To minimize vagueness, it is crucial to seek conceptual clarity. (Ekland and Gibbs 1998: 17).

#### **4. Theory, testing and knowledge production**

A theory comprises concepts or generalizations that aim to explain reality, and science consistently strives to examine hypotheses to make generalizations, predictions, or refutations. However, accurate and proper data control is necessary to test hypotheses effectively. Gibbs analyzed 100 articles published in the *American Journal of Sociology* from 2004 to 2014 and discovered that less than 20% of the articles conducted tests comparing the predictive power and strength of different generalizations. It was also found that only two articles constitute a distinct set of generalizations in the form of multivariate theory, generalizations made in the form of regression coefficient variables (Ekland and Gibbs, 1998: 11-12).

Giddens suggests that researchers tend to shape their hypotheses to fit their initial theoretical frameworks, and they limit their focus to areas where it is easy to test their hypotheses empirically. However, this approach can lead to a sterile dilemma in sociology, making it unrealistic (Giddens, 1971: 29).

Some sociologists and psychologists argue that maintaining scientific rigor in the discipline necessitates quantifying social phenomena and disregarding immeasurable factors. However, a truly scientific mindset entails striving to approach the truth as closely as possible given the circumstances.

If we cannot achieve a certain level of precision, it becomes risky to adopt a neutral stance, especially for those who refuse to study certain phenomena due to the inability to measure variables. This refusal ultimately leads to the stagnation of sociology (Anderski, 1975: 88).

In the early days of the Chicago School, interpretive sociology and ethnographic studies aimed to conduct various investigations and research by focusing on understanding reality through the social actor and the historical treatment of phenomena. This approach aimed to move away from the reductionism seen in empirical sciences, which isolates phenomena from their contexts. This results in a more profound comprehension of social problems, even though Gibbs argues that ethnography and field experiments are not the sole origins of vaguely stated claims in social science literature. These perspectives, such as Freudian and Marxist interpretations, are also influenced by historical contexts. (Ekland and Gibbs, 1998: 10)

In contrast, Fleck's perspective is that concepts do not arise spontaneously; rather, they are shaped by their predecessors and have ancient origins. Fleck emphasizes the importance of historical and comparative research in the field of epistemology, dismissing any epistemological approaches that do not incorporate these investigations as superficial and speculative (Fleck, 2010: 21).

## **5. The mission of sociology**

The mission of sociology consists in the systematic investigation of contemporary society, in explaining its structure, functioning, and transformations, as well as in interpreting the social processes that shape the evolution of humanity within a global context marked by uncertainty and accelerated change (Otovescu & Otovescu, 2025: 13-19). Sociology seeks not only to describe social realities but also to identify dysfunctions, pathological or destabilizing phenomena, and the mechanisms that influence social cohesion, thus contributing to the formulation of realistic solutions for improving the human condition (Otovescu & Otovescu, 2025: 13-19).

Sociologist Emanuel Wallerstein suggests that sociologists can effectively analyze social reality by studying a significant descriptive anomaly and exploring its origins and impacts (Wallerstein, 1999: 139). Answering this question necessitates researching methods that help us comprehend society in all its complexities, without intending to manipulate or make utopian promises. However, understanding and explaining societal phenomena can encounter both epistemological and methodological challenges, as the concept of society can vary across different contexts.

T. Adorno argued in his sociology lectures that societies, such as capitalist and socialist ones, cannot be conceptualized in the same way. These societies reflect different social structures based on major sociological theories like Marxism and functionalism, each with their own concepts and conceptualizations (Adorno, 2000: 28). The proponents of these theories, with their different beliefs, aimed to experiment with these theories in real-world situations and assess their capacity to

explain different aspects of reality. This reflects the dominant empiricism in American sociology during the previous century. These experiments consistently validated certain theories, particularly functionalism, and further bolstered their credibility, as demonstrated by the work of Merton and Parsons' followers.

The disparity between the two theories could stem from functionalism being seen as reductionist, whereas Marxism takes a historical approach to depict present-day societies and some argue that these developmental stages are irrelevant for analyzing modern societies. In his book mentioned earlier, Adorno argues that the categorization of societies, such as hunter-gatherer and pastoralist, merely represents how human life is produced and sustained, and they differ from the conventional understanding of society as described by Weber's bourgeois sociology and its counterpart, capitalist society (Adorno, 2000: 29). While Dahrendorff attempts to use the concept of industrial society to encompass Western societies, it is important to note that these societies primarily revolve around economic organization, representing a specific phase in the historical progression of societies based on production, distribution, and consumption. Furthermore, they align with the political structure of the liberal state. Thus, it is evident that we are up against a critical challenge, given that the majority of sociological theories have emerged from industrialized Western societies and have primarily aimed to comprehend and examine them. However, what about the diverse societies with their own distinctive features?

In his book "New Rules of Sociological Method," sociologist Giddens assumes the responsibility of clarifying how to reinterpret the social world. He focuses on the preconceived notions of social actors within the theoretical schemes and frames of meaning. Here, Giddens discusses hermeneutic dualism, which is a highly intricate undertaking. In doing so, he aims to resolve the predicament of construction and action, as well as the challenges that have arisen with interpretive trends in sociology. Going back to the initial idea of prediction discussed in this article, which suggests a need for a revival of positivist sociology and the exploration of generalizations, Giddens asserts that constructivist analysis in the social sciences and the causal relationships represented by theoretical generalizations are not based on fixed mechanical correlations found in nature, but rather on the outcomes of human actions (Giddens, 2000, p. 270).

## **6. Conclusion:**

In concluding this paper, we would like to point out two main positions:

The subtitle of Gibbs' book, "Predictive power is the name of the Game", alludes to a return to the origins of positivist sociology. This return comes after a tumultuous period of competing and conflicting theories that had plagued the field. Reviving this trend might be challenging, especially considering the numerous setbacks and criticisms it has faced. Mc Kraken refers to this period as the "winter of positivism," and even in its modern iteration, with E. Neurath advocating for the creation of universal propositions rooted in shared experiences, it remains a complex task.



Like any other scientific discipline, sociology relies on a framework of categories that shape knowledge structures. These categories and the associated structures constitute social realities that sociology must investigate.

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## **Learning Under Pressure: The Interplay Between Learning Strategies And Psychological Difficulties In High School Students**

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### **Abstract:**

Adolescence is a critical period in which cognitive, motivational, and socio-emotional trajectories converge, shaping both academic outcomes and psychological well-being. This study investigates the relationship between learning strategies and psychological difficulties among high school students, with a focus on self-concept, test anxiety, and conduct-related problems. A sample of 569 adolescents (ages 14–19) completed the School Motivation and Learning Strategies Inventory (SMALSI) and the Adolescent Psychopathology Scale – Short Form (APS-SF). Correlational and regression analyses revealed that study strategies were negatively associated with conduct disorder, highlighting their protective role in reducing disruptive behavior. Conversely, low academic motivation was strongly linked to conduct problems, underscoring the risks of motivational deficits. Mediation analyses confirmed that test anxiety partially suppressed the positive effect of cognitive strategies on academic performance. Self-concept showed a weak but significant association with study strategies, while time management and organizational techniques formed a coherent cluster of self-regulated learning. Unexpectedly, study strategies positively predicted disordered eating, suggesting that intensive academic engagement may coincide with maladaptive coping mechanisms. These findings emphasize the need for integrative interventions that address cognitive, motivational, and emotional dimensions of learning. Educational practices fostering self-regulation, autonomy, and psychological resilience can optimize both academic success and adolescent well-being.

**Keywords:** *Learning strategies; Self-regulated learning; Test anxiety; Self-concept; Academic motivation; Conduct disorder; Disordered eating; High school students*

## 1. Introduction

The optimization of learning during adolescence has become a central concern for both educational psychology and developmental psychopathology. High school constitutes a unique developmental stage where cognitive, motivational, and socio-emotional trajectories converge, shaping not only immediate academic outcomes but also long-term educational and occupational success. In this period of heightened vulnerability and opportunity, students are faced with increasingly complex curricular demands while simultaneously navigating identity formation, peer relationships, and exposure to stressors that may challenge their psychological balance. Understanding how adolescents learn, and more specifically how their strategies for learning interact with psychological difficulties, represents a critical step in advancing evidence-based educational practice.

Learning strategies have long been recognized as pivotal tools in academic achievement. They involve deliberate methods employed by learners to enhance comprehension, retention, and application of information. From basic cognitive techniques such as rehearsal and note-taking to more complex metacognitive processes like planning, monitoring, and evaluation, these strategies enable students to regulate their own learning processes. Their importance is amplified at the high school level, where autonomy in learning becomes progressively more essential. However, research increasingly suggests that these strategies cannot be disentangled from the psychological context in which they are deployed. Anxiety, depression, oppositional behaviors, or a fragile self-concept can undermine the effectiveness of even the most sophisticated learning strategies, while positive emotional regulation and self-beliefs may amplify their impact.

The growing interest in this interaction reflects a broader paradigm shift: educational outcomes are no longer conceptualized solely as the product of cognitive skills, but as the result of dynamic exchanges between cognition, motivation, and mental health. Adolescents who suffer from psychological difficulties often present with reduced motivation, impaired concentration, and maladaptive coping mechanisms, all of which hinder the use of effective learning strategies. Conversely, students with a positive sense of self and strong impulse control tend to engage more actively in their education, benefiting fully from strategies of organization, reflection, and self-regulation. These observations suggest that psychological vulnerabilities and strengths may act as mediators or moderators in the relationship between learning strategies and academic performance.

Despite the conceptual importance of this framework, empirical investigations remain insufficiently integrated. Studies often address learning strategies or psychological difficulties in isolation, rarely examining their combined effects on learning outcomes in adolescence. This separation perpetuates a fragmented understanding and overlooks the potential mechanisms through which cognition and mental health jointly influence school success. Moreover, interventions designed to enhance learning in high school frequently emphasize cognitive

techniques without systematically addressing the psychological barriers that prevent their effective use. In practice, this leads to partial or inconsistent results: while some students benefit from strategic instruction, others fail to translate these methods into improved outcomes due to underlying emotional or behavioral challenges.

The empirical study presented in this article seeks to bridge this gap by adopting a correlational perspective. Rather than treating learning strategies and psychological difficulties as independent domains, it examines the extent to which these variables interact in predicting academic functioning among high school students. Specifically, the research considers the role of self-concept as a mediator and impulse control as a moderator, exploring how these psychological dimensions may condition the effectiveness of cognitive and metacognitive strategies. Such an approach acknowledges the complexity of adolescent learning, moving beyond simplistic cause-effect models to a more nuanced understanding of interaction effects.

The rationale for this perspective is twofold. Theoretically, it advances the integration of educational psychology and developmental psychopathology, two domains that have historically developed in parallel. While the former emphasizes self-regulated learning and cognitive development, the latter highlights the impact of emotional difficulties and behavioral problems. By connecting these traditions, the study contributes to a more comprehensive model of adolescent learning. Practically, the findings have the potential to inform interventions that are both pedagogically and psychologically responsive. If certain psychological variables are shown to mediate or moderate the impact of learning strategies, educators and psychologists can design targeted programs that address not only how students study but also how they cope with stress, regulate emotions, and construct a positive sense of self.

Furthermore, the focus on high school education provides added relevance. Unlike primary education, where learning is heavily scaffolded by teachers and parents, high school demands greater independence from students. At the same time, unlike higher education, high school coincides with developmental challenges that increase vulnerability to psychological distress. This dual pressure makes adolescence a decisive period for cultivating strategies that can protect against both academic failure and psychological dysfunction. Insights gained from empirical evidence at this stage may thus guide preventive measures that promote both educational achievement and mental health.

Understanding adolescents' learning strategies cannot be entirely separated from the social context of performance and from the mechanisms through which "prestige" is constructed, validated, and distributed within institutions. Analyses of prestige-building techniques in the public sphere, including highly hierarchical political contexts, show how formal and symbolic recognition can become instruments of pressure, conformity, and control, generating standards of success that are internalized by individuals (Betea & Cioacă, 2022). In educational settings, such mechanisms may contribute to transforming academic achievement into an identity-based obligation, with implications for self-evaluation, performance anxiety, and the ways in which students organize their learning efforts. Consequently,

cognitive and self-regulated learning strategies should also be understood as adaptive responses to a culture of evaluation and recognition, rather than solely as individual competencies.

The present research therefore aims to elucidate the correlational links between learning strategies and psychological difficulties in high school, grounding the investigation in robust theoretical assumptions and validated measurement tools. By employing standardized questionnaires and advanced statistical modeling, it seeks to uncover not only direct relationships but also the more complex mediated and moderated pathways through which these variables interact. In doing so, it responds to the need for empirical studies that reflect the multidimensional reality of adolescent learning.

Ultimately, the contribution of this study lies in demonstrating that optimizing learning in high school requires more than teaching students how to study effectively. It demands an integrative approach that considers their cognitive strategies in conjunction with their psychological profile, acknowledging that learning and mental health are mutually reinforcing processes. By highlighting the interaction between these domains, the study provides both a conceptual and applied foundation for developing interventions that are better tailored to the diverse needs of adolescents, thereby advancing the overarching goal of inclusive and effective education.

## **2. Literature review**

The theoretical documentation for this research started from the premise that any analysis of the relationship between learning strategies and psychological difficulties in high school must be grounded in a solid scientific basis, anchored in the most relevant contributions in the field. For this purpose, a systematic bibliographic strategy was applied, using the Web of Science Core Collection as the main reference database. The choice of this platform was justified by its international recognition, the rigor of its indexing process, and the relevance of the works included for exploring complex links between educational and psychological constructs. Unlike other databases, Web of Science not only provides an extensive repository of peer-reviewed publications but also facilitates their integration into advanced bibliometric analyses, allowing the mapping of research directions and the identification of thematic convergences.

The search strategy was deliberately restrictive in order to achieve high thematic specificity. The query was limited to the title field (TI), focusing on articles that explicitly included the target terms. The chosen formula, TI=("learning strategies" AND "high school"), enabled the retrieval of works that directly addressed the application of learning strategies in secondary education. By restricting the search to explicit mentions in titles, the process minimized the inclusion of marginally related works and ensured a concentrated corpus for analysis.

Following the search, a total of eleven articles were identified as directly relevant to the topic of learning strategies in high school. The metadata of these articles were examined in relation to Web of Science Categories (WC) and extended

Subject Categories (SC), which provided a dual framework for classification. This allowed the positioning of the studies within their disciplinary domains and highlighted the intersections between education, psychology, and behavioral sciences. To gain a deeper understanding of how these works are conceptually related, bibliometric mapping was conducted using **VOSviewer**, focusing on keyword co-occurrence networks.



**Figure 1.** Thematic clusters based on keyword co-occurrence in literature (VOSviewer, Web of Science data).

*Source:* Own elaboration using VOSviewer

The resulting semantic map revealed several thematic clusters. At the center of the network, the keyword **“learning strategies”** formed the nucleus of the largest cluster, tightly connected to terms such as **“achievement”**, **“performance”**, **“self-efficacy”**, and **“academic outcomes”**. This cluster reflects the mainstream research agenda, emphasizing the predictive value of learning strategies for school success. Beyond this core, additional clusters highlighted more specific areas of inquiry: one cluster was structured around metacognitive and digital strategies, capturing recent interest in the integration of technology into learning processes. This diversification also resonates with evidence that students who engage intensively in academic achievement may simultaneously experience heightened stress, which can foster maladaptive coping behaviors such as disordered eating; another focused on **methodological approaches** to assessing strategies, reflecting the need for validated instruments; while a further cluster explored the application of learning strategies in **foreign language acquisition**, a domain where cognitive and motivational aspects intersect intensely.

Together, these clusters delineate a research landscape that is both diversified and interconnected. On one hand, the centrality of achievement-oriented outcomes confirms the dominance of a performance-based paradigm in educational psychology. On the other hand, the peripheral clusters signal the diversification of approaches, pointing to newer directions such as digital learning, gamification, and domain-specific adaptations. This structure suggests that while the field has

established a solid core around achievement and self-efficacy, it is simultaneously expanding into emerging domains that address the realities of contemporary schooling.

Building on the bibliometric analysis, the literature review offers a more detailed synthesis of the empirical studies identified. A first strand of research underscores the importance of self-regulated learning (SRL), particularly cognitive and metacognitive strategies, in facilitating both academic performance and psychological well-being, which conceptualize effective learning as a dynamic process of goal setting, monitoring, and strategic adaptation. For instance, demonstrated that students with a richer vocabulary are more adept at using metacognitive strategies, which enhances their capacity for self-regulation and reduces the discomfort associated with misunderstanding tasks or complex content. Similarly, found positive correlations between mastery-oriented goals and the adoption of deep learning strategies such as elaboration and critical thinking, while avoidance strategies were linked to emotional difficulties and lower performance levels. These findings reinforce the idea that learning strategies are not neutral tools but are embedded within motivational and emotional contexts that can either enhance or undermine their effectiveness.

Building upon these foundations, further studies have highlighted the contextual variability in the effectiveness of learning strategies. emphasized that the success of a given strategy depends largely on the motivational profile of the learner. For highly motivated students, contextualized learning methods foster deeper engagement and better academic results, whereas for students with lower motivation, more structured and traditional approaches often prove more effective. This finding underscores the importance of aligning instructional strategies with the psychological readiness of learners rather than assuming universal applicability.

The role of the family and broader social environment has also been investigated. demonstrated that democratic and permissive parenting styles positively influence the adoption of organizational and self-regulatory learning strategies, while simultaneously buffering students from psychological risks such as anxiety and school-related stress. Their results confirm that learning strategies are not simply individual skills but are embedded in a socio-emotional ecology that either supports or hinders their development.

The literature also includes contributions specifically relevant to psychology as a subject of study in high school. Medina Coronado and Nagamine Miyashiro (2019) showed that autonomous learning strategies - such as preparing for assessment, collaborating with peers, and engaging actively with content - are strong predictors of performance in text comprehension. Their findings are particularly pertinent in psychology, a discipline that demands reflective and critical processing of information. Similarly, Tran et al. (2021) demonstrated that self-regulated learning strategies such as self-evaluation, self-reward, and goal-setting not only improved academic performance but also promoted emotional self-regulation, thereby reducing anxiety and stress in project-based educational contexts (Cassady and Johnson, 2002; Owens et al., 2012). These findings are echoed by Thiendathong and Sukying (2021),

who, focusing on vocabulary learning strategies, showed that students who strategically employ repetition, contextual analysis, and social engagement strengthen their autonomy, decrease dependency on external factors, and consolidate their sense of self-efficacy.

In addition to cognitive and digital strategies, motivational frameworks also play a decisive role. Trigueros Ramos and Navarro Gómez (2019) validated a model showing that when teachers support students' autonomy, basic psychological needs such as competence, relatedness, and novelty are satisfied. This generates self-determined motivation, which in turn encourages the use of metacognitive strategies and critical thinking, both of which directly predict academic performance. Conversely, when teachers exert psychological control, students experience frustration, externalized motivation, and ultimately lower academic achievement. This evidence strengthens the argument that learning strategies cannot be separated from the motivational climate established in the classroom.

The importance of classroom motivation and peer participation is further illustrated by Yajima and Arai (1996) in a Japanese context. Their study revealed that class structures emphasizing participation, recognition, cooperation, and task orientation significantly shape students' perceptions of competence, their use of self-regulated learning strategies, and their levels of performance anxiety. Active participation and task orientation were associated with better self-regulation and reduced anxiety, while an overemphasis on external recognition heightened stress and hindered learning (Boekaerts, 1999). Despite its early publication date, this study remains influential, underscoring the enduring relevance of motivational structures in shaping the interplay between learning strategies and psychological well-being.

Taken together, the studies reviewed converge on several critical insights. First, self-regulated learning strategies, particularly those involving metacognitive awareness and active cognitive engagement, consistently predict both academic performance and psychological resilience. Second, contextual factors - ranging from motivation and parenting styles to digital environments and teacher autonomy support - moderate the effectiveness of these strategies, highlighting the multi-layered nature of the learning process. Third, psychological difficulties such as anxiety, stress, and low self-efficacy are not merely outcomes of poor learning strategies but also reciprocal factors that inhibit their deployment, creating a feedback loop that can either reinforce success or perpetuate failure.

For the specific case of teaching psychology in high school, these insights acquire particular significance. As a subject that requires introspection, critical thinking, and value-based reflection, psychology demands more than rote memorization; it requires a balanced integration of cognitive strategies, emotional regulation, and self-directed motivation. The literature reviewed indicates that when students are encouraged to adopt self-regulated strategies within a supportive motivational climate, they not only improve their academic outcomes but also develop healthier emotional patterns and a stronger sense of responsibility toward their own learning.



This bibliometric and theoretical synthesis therefore provides a robust foundation for the present empirical investigation. By systematically mapping the thematic clusters of research and integrating empirical findings across diverse contexts, the groundwork has been laid for analyzing the correlation between learning strategies and psychological difficulties among high school students. The findings of prior studies suggest a strong rationale for expecting significant relationships between these constructs. The current study seeks to build on this foundation, employing a correlational design to explore how specific learning strategies interact with psychological barriers in shaping learning outcomes in psychology education at the secondary level.

### 3. Methodology

The present study was designed with the primary aim of investigating the relationship between high school students' learning strategies and the psychological difficulties they experience in the process of learning psychology as a school subject. Beyond exploring whether cognitive, metacognitive, and self-regulatory strategies are associated with academic performance and motivation, the research also considered the role of psychological variables such as test anxiety, school-related stress, and self-concept in mediating or moderating these associations. By employing a correlational approach, the study sought to provide an empirically grounded basis for differentiated pedagogical interventions tailored to the psychological profiles of students.

In order to guide the investigation, a set of research questions and objectives were formulated. The central objective was to explore the link between learning strategies and psychological difficulties in high school students, with the broader goal of identifying effective approaches for optimizing educational practice. More specifically, the study investigated whether significant relationships exist between learning strategies, as measured by the *School Motivation and Learning Strategies Inventory* (SMALSI), and psychological difficulties, as measured by the *Adolescent Psychopathology Scale – Short Form* (APS-SF). It further examined the extent to which organizational techniques, time management, and test-taking strategies could predict conduct problems, oppositional behavior, and school-related difficulties. Additionally, the role of academic motivation and test anxiety in shaping these relationships was assessed, together with the potential differences in student profiles depending on their level of self-concept. Finally, the study sought to determine whether the strategies identified through SMALSI could be translated into differentiated classroom interventions in the teaching of psychology.

The research design operationalized two categories of variables. The independent variables were represented by the ten scales of the SMALSI, covering study strategies, note-taking, reading comprehension, writing skills, test-taking strategies, organizational techniques, time management, low academic motivation, test anxiety, and concentration problems. The dependent variables were measured through four scales of the APS-SF, namely conduct disorder, oppositional defiant disorder, school problems, and self-concept. Based on the literature, several

hypotheses were advanced, predicting, for instance, negative correlations between study strategies and conduct-related problems, a positive association between academic motivation and the use of learning strategies, mediation effects of test anxiety and concentration difficulties, and the link between positive self-concept and more efficient learning behaviors.

The study was conducted on a sample of 569 high school students, aged between 14 and 19 years ( $M = 16.82$ ), distributed across three grade levels (264 in grade 10, 100 in grade 11, and 205 in grade 12). The sample showed a slight predominance of female students (54.65%), while males accounted for 45.35%. In terms of ethnicity, the group was relatively homogeneous, with 92.1% identifying as Romanian, 5.8% as Turkish/Tatar, and 2.1% as Roma. The balanced distribution of participants across gender and grade levels enhances the representativeness of the sample, while its relative homogeneity in terms of ethnicity provides a controlled context for interpretation.

**Table 1.** Sociodemographic Characteristics of the Participants by Grade Level and Ethnicity

| Variable  | Category      | Grade 10 (n, %) | Grade 11 (n, %) | Grade 12 (n, %) | Total (n, %) |
|-----------|---------------|-----------------|-----------------|-----------------|--------------|
| Gender    | Female        | 124 (46.97)     | 65 (65.00)      | 122 (59.51)     | 311 (54.65)  |
|           | Male          | 140 (53.03)     | 35 (35.00)      | 83 (40.49)      | 258 (45.35)  |
|           | Total         | 264 (100)       | 100 (100)       | 205 (100)       | 569 (100)    |
| Ethnicity | Romanian      | –               | –               | –               | 524 (92.10)  |
|           | Roma          | –               | –               | –               | 12 (2.11)    |
|           | Turkish/Tatar | –               | –               | –               | 33 (5.80)    |
|           | Total         | –               | –               | –               | 569 (100)    |

*Note.*  $N = 569$ . Values represent absolute frequencies (n) and percentages (%). Symbol “–” indicates lack of detailed distribution by grade level for ethnic categories.

Two standardized instruments were employed. The APS-SF is a validated tool designed to measure clinical symptoms and psychosocial problems in adolescents, comprising 12 clinical subscales and 2 validity subscales. For the purposes of this study, four scales were selected: conduct disorder, oppositional defiant disorder, school problems, and self-concept. Complementarily, the SMALSI was administered to assess ten constructs linked to learning strategies and school motivation, seven of which highlight strengths - study strategies, note-taking, reading, writing, test-taking, organizational skills, and time management - while three address weaknesses, namely low academic motivation, test anxiety, and concentration difficulties. The adolescent form (13–18 years), including 170 items, was used.

Data collection took place in classroom settings, during psychology lessons, under conditions ensuring confidentiality and voluntary participation. Informed consent was obtained both from students and school authorities prior to administration. The analysis plan combined descriptive and inferential statistics. Initial analyses provided an overview of the demographic and psychological profiles of the participants, followed by correlation analyses to test the associations between learning strategies and psychological difficulties. Predictive relationships were examined through multiple regression models, while mediation effects of test anxiety and concentration difficulties were explored using regression-based procedures, specifically the PROCESS macro (Model 4). All statistical analyses were conducted using SPSS version 27.0.

#### 4. Results

The empirical results are presented in a structured manner, highlighting the statistical evidence that supports or contradicts the research hypotheses. Each set of analyses integrates tests of normality, correlation matrices, and regression outputs, providing a coherent interpretation of the relationships among the studied variables.

The first stage of the analysis examined whether the study variables followed a normal distribution. As shown in **Table 2**, only the variable *Study Strategies* approximated normality, with non-significant Kolmogorov–Smirnov ( $p = .065$ ) and Shapiro–Wilk ( $p = .058$ ) tests. In contrast, *Conduct Disorder*, *Oppositional Defiant Disorder*, and *School Problems* significantly deviated from normality, with  $p < .001$  in both tests. Given these deviations, Spearman’s rho was adopted as the most appropriate method for correlation analysis.

**Table 2.** Normality Tests

| Variable                      | Kolmogorov–Smirnov Statistic <sup>a</sup> | df  | Sig. | Shapiro–Wilk Statistic | df  | Sig. |
|-------------------------------|-------------------------------------------|-----|------|------------------------|-----|------|
| Study Strategies              | .037                                      | 569 | .065 | .995                   | 569 | .058 |
| Conduct Disorder              | .168                                      | 569 | .000 | .872                   | 569 | .000 |
| Oppositional Defiant Disorder | .091                                      | 569 | .000 | .972                   | 569 | .000 |
| School Problems               | .077                                      | 569 | .000 | .914                   | 569 | .000 |

*Note.* N = 569. Lilliefors Significance Correction applied.

The correlation matrix presented in **Table 3** demonstrates that the frequency of study strategies is weakly but significantly and negatively associated with conduct disorder ( $\rho = -.112$ ,  $p = .008$ ). This suggests that students who apply learning strategies more frequently report slightly fewer behavioral symptoms of conduct disorder. However, no significant relationship was observed between study strategies and oppositional defiant disorder ( $\rho = -.005$ ,  $p = .907$ ), nor between study strategies and school problems ( $\rho = -.029$ ,  $p = .484$ ). In contrast, the psychological variables themselves were strongly interrelated, with moderate to strong correlations: conduct

disorder with oppositional defiant disorder ( $\rho = .564, p < .001$ ), conduct disorder with school problems ( $\rho = .549, p < .001$ ), and oppositional defiant disorder with school problems ( $\rho = .691, p < .001$ ). These findings point to a cluster of interconnected difficulties in the behavioral and academic domains.

**Table 3.** Descriptive Statistics and Spearman Correlations for Study Variables

| Variable                         | n   | M     | SD   | 1     | 2      | 3      | 4      |
|----------------------------------|-----|-------|------|-------|--------|--------|--------|
| 1. Study Strategies              | 569 | 16.78 | 6.55 | –     | –      | –.005  | –.029  |
| 2. Conduct Disorder              | 569 | 3.41  | 3.33 | –     | –      | .564** | .549** |
| 3. Oppositional Defiant Disorder | 569 | 7.01  | 3.61 | –.005 | .564** | –      | .691** |
| 4. School Problems               | 569 | –     | –    | –.029 | .549** | .691** | –      |

*Note.* All correlations are Spearman's rho coefficients. \*\* $p < .01$  (2-tailed).  $N = 569$ .  $M$  = mean;  $SD$  = standard deviation.

The second hypothesis concerned the role of academic motivation in shaping learning strategies and behavioral difficulties. Tests of normality reported in **Table 4** revealed that *Low Academic Motivation* deviated significantly from normality ( $p = .002$ ), whereas *Study Strategies* approximated normality, and *Conduct Disorder* showed significant deviations. Consequently, non-parametric correlations were again employed.

**Table 4.** Normality Tests

| Variable                | Kolmogorov–Smirnov <sup>a</sup> |     |      | Shapiro–Wilk |     |      |
|-------------------------|---------------------------------|-----|------|--------------|-----|------|
|                         | Statistic                       | df  | Sig. | Statistic    | df  | Sig. |
| Low Academic Motivation | .050                            | 569 | .002 | .991         | 569 | .002 |
| Study Strategies        | .037                            | 569 | .065 | .995         | 569 | .058 |
| Conduct Disorder        | .168                            | 569 | .000 | .872         | 569 | .000 |

*Note.* <sup>a</sup>Lilliefors Significance Correction.

The correlation results in **Table 5** show a significant positive association between low academic motivation and conduct disorder ( $\rho = .361, p < .01$ ), indicating that students with lower academic drive tend to present higher levels of disruptive behavior. In addition, study strategies were significantly and negatively correlated with conduct disorder ( $\rho = -.112, p < .01$ ), suggesting that frequent use of learning strategies may buffer against behavioral difficulties. However, no significant relationship emerged between low academic motivation and study strategies ( $\rho = -.013, p = .763$ ). Together, these results highlight a dual pattern: motivation deficits

are linked to behavioral problems, whereas study strategies function as protective factors.

Table 5. Descriptive Statistics and Spearman Correlations for Study Variables

| Variable                   | n   | M     | SD   | 1      | 2       | 3       |
|----------------------------|-----|-------|------|--------|---------|---------|
| 1. Low Academic Motivation | 569 | 19.76 | 8.52 | –      | -.013   | .361**  |
| 2. Study Strategies        | 569 | 25.87 | 8.82 | -.013  | –       | -.112** |
| 3. Conduct Disorder        | 569 | 3.41  | 3.33 | .361** | -.112** | –       |

*Note.* Correlations are Spearman's rho coefficients. \*\* $p < .01$  (2-tailed).  $N = 569$ .  $M$  = mean;  $SD$  = standard deviation.

The third hypothesis focused on the mediating role of test anxiety in the relationship between cognitive strategies and academic performance. As displayed in **Table 6**, the regression model explained academic performance significantly. Cognitive strategies were strong positive predictors ( $B = 0.737$ ,  $SE = 0.011$ ,  $\beta = .917$ ,  $t = 67.565$ ,  $p < .001$ ), while test anxiety had a significant negative standardized effect ( $\beta = -.103$ ,  $p < .001$ ). Although the unstandardized coefficient for test anxiety was positive, the standardized coefficient clarified its inhibitory impact. These findings confirm that cognitive strategies strongly enhance performance, while test anxiety undermines it, partially mediating the overall relationship.

**Table 6.** Regression Results for Predicting Academic Performance

| Predictor            | B      | SE    | $\beta$ | t      | p      |
|----------------------|--------|-------|---------|--------|--------|
| (Constant)           | -0.473 | 1.137 | –       | -0.416 | .678   |
| Cognitive Strategies | 0.737  | 0.011 | .917    | 67.565 | < .001 |
| Test Anxiety         | 0.199  | 0.026 | -.103   | 7.570  | < .001 |

*Note.* Dependent variable: Academic Performance.  $B$  = unstandardized coefficient;  $SE$  = standard error;  $\beta$  = standardized coefficient.  $p < .001$  indicates a statistically significant effect.  $N = 569$ .

The fourth hypothesis addressed self-concept and its association with learning-related dimensions. Tests of normality (see **Table 7**) showed that self-concept significantly deviated from normality ( $p < .001$ ), while study strategies, time management, and organizational techniques were approximately normally distributed. This justified a mixed analytic approach, combining non-parametric and parametric interpretations.

**Table 7.** Tests of Normality

| Variable              | Kolmogorov–Smirnov <sup>a</sup> |     |      | Shapiro–Wilk |     |      |
|-----------------------|---------------------------------|-----|------|--------------|-----|------|
|                       | Statistic                       | df  | Sig. | Statistic    | df  | Sig. |
| Self-concept          | .093                            | 568 | .000 | .978         | 568 | .000 |
| Study Strategies      | .037                            | 568 | .065 | .995         | 568 | .053 |
| Time Management       | .057                            | 568 | .000 | .996         | 568 | .143 |
| Organizational Skills | .050                            | 568 | .002 | .996         | 568 | .131 |

*Note.* <sup>a</sup>Lilliefors Significance Correction.

The correlations reported in **Table 8** indicate a weak but significant positive link between self-concept and study strategies ( $\rho = .089$ ,  $p < .05$ ), meaning that students with a more positive self-view tend to engage slightly more in structured learning. In contrast, self-concept was not significantly related to time management ( $\rho = .025$ ,  $p = .563$ ) or organizational techniques ( $\rho = .035$ ,  $p = .441$ ). However, strong interrelations were observed among study strategies, time management, and organizational skills ( $\rho$  ranging from .654 to .686, all  $p < .001$ ), underlining their integrated function as dimensions of self-regulated learning. These findings suggest that while self-concept contributes only marginally to learning strategies, the structural coherence between organization and time management is central to effective academic functioning.

**Table 8.** Descriptive Statistics and Spearman Correlations for Study Variables

| Variable                 | n   | M     | SD   | 1     | 2      | 3      | 4      |
|--------------------------|-----|-------|------|-------|--------|--------|--------|
| 1. Self-concept          | 568 | 6.63  | 3.37 | –     | .089*  | .025   | .035   |
| 2. Study Strategies      | 569 | 25.87 | 8.82 | .089* | –      | .654** | .680** |
| 3. Time Management       | 569 | 23.92 | 7.66 | .025  | .654** | –      | .686** |
| 4. Organizational Skills | 569 | 23.96 | 7.06 | .035  | .680** | .686** | –      |

*Note.* Correlations are Spearman's rho coefficients. \* $p < .05$ . \*\* $p < .01$  (2-tailed). N = 568–569. M = mean; SD = standard deviation.

The fifth hypothesis examined whether study strategies significantly predict disordered eating behaviors and oppositional defiant tendencies. Tests of normality (see **Table 9**) confirmed that both outcome variables deviated significantly from a normal distribution ( $p < .001$ ), requiring regression analyses adapted to non-parametric distributions.

**Tabel 9.** Tests of Normality

| Variable                      | Kolmogorov–Smirnova <sup>a</sup> |     |      | Shapiro–Wilk |     |      |
|-------------------------------|----------------------------------|-----|------|--------------|-----|------|
|                               | Statistic                        | df  | Sig. | Statistic    | df  | Sig. |
| Conduct Disorder              | .168                             | 569 | .000 | .872         | 569 | .000 |
| Oppositional Defiant Disorder | .091                             | 569 | .000 | .972         | 569 | .000 |

Note. <sup>a</sup>Lilliefors Significance Correction.

Regression results summarized in **Table 10** demonstrated that study strategies were significant positive predictors of disordered eating ( $B = 0.073$ ,  $SE = 0.016$ ,  $\beta = .187$ ,  $t = 4.543$ ,  $p < .001$ ). This counterintuitive association suggests that while study strategies are typically considered protective, in this case, their higher frequency may coincide with maladaptive eating patterns, perhaps reflecting stress-driven academic engagement. In contrast, the regression predicting oppositional defiant behavior (see **Table 11**) was not significant ( $B = -.004$ ,  $SE = 0.017$ ,  $\beta = -.011$ ,  $p = .797$ ), indicating that study strategies do not account for variance in oppositional tendencies. These findings highlight the differentiated role of study strategies: beneficial in reducing conduct disorder and buffering academic stress, but not directly mitigating oppositional defiant behavior, and paradoxically linked to disordered eating in the sample studied.

**Table 10.** Regression Results for Predicting Disordered Eating

| Predictor        | B     | SE   | $\beta$ | t     | p     |
|------------------|-------|------|---------|-------|-------|
| (Constant)       | 2.172 | .437 | —       | 4.972 | <.001 |
| Study Strategies | .073  | .016 | .187    | 4.543 | <.001 |

Note. Dependent variable: Disordered Eating. B = unstandardized coefficient; SE = standard error;  $\beta$  = standardized coefficient.  $p < .001$  indicates a statistically significant effect.  $N = 569$ .

**Table 11.** Regression Results for Predicting Oppositional Defiant Behavior

| Predictor        | B     | SE   | $\beta$ | t      | p     |
|------------------|-------|------|---------|--------|-------|
| (Constant)       | 7.120 | .470 | —       | 15.143 | <.001 |
| Study Strategies | -.004 | .017 | -.011   | -.257  | .797  |

Note. Dependent variable: Oppositional Defiant Behavior. B = unstandardized coefficient; SE = standard error;  $\beta$  = standardized coefficient. The model is not statistically significant.  $N = 569$ .

## 5. Discussion

The present study contributes to the growing body of research on the interplay between learning strategies, motivational orientations, and psychological difficulties among adolescents in formal educational settings. The findings provide

evidence that the use of cognitive and metacognitive strategies is positively related to academic performance and negatively associated with conduct-related problems, supporting the assumption that structured learning behaviors can serve as protective factors against maladaptive outcomes. The significant negative correlation between study strategies and conduct disorder suggests that students who engage in systematic, self-regulated study practices are less likely to develop disruptive behaviors. This is consistent with previous research indicating that self-regulation in learning fosters both academic success and socio-emotional adjustment (Pintrich, 2000; Zimmerman, 2008).

At the same time, the strong positive association between low academic motivation and conduct disorder highlights the risk posed by motivational deficits. Students who lack academic drive appear more prone to oppositional and maladaptive behaviors, a finding that resonates with prior work emphasizing the role of intrinsic motivation in sustaining adaptive learning and reducing behavioral problems (Deci and Ryan, 2000; Schunk et al., 2014). Interestingly, no significant relationship was found between low academic motivation and the adoption of learning strategies, suggesting that motivational and cognitive dimensions may operate in relatively independent domains. This underscores the need for differentiated interventions: while cognitive training may improve the efficiency of study practices, targeted motivational programs are required to address students' affective and volitional engagement.

The regression model including both cognitive strategies and test anxiety provides further insight into the dual impact of cognitive and emotional processes on academic outcomes. As anticipated, cognitive strategies emerged as the strongest positive predictor of performance, while test anxiety significantly inhibited achievement. This finding confirms the partial mediation hypothesis and illustrates the disruptive role of anxiety in learning, in line with studies highlighting the detrimental effect of excessive emotional arousal on working memory and concentration (Cassady and Johnson, 2002; Owens et al., 2012). Therefore, psychological support interventions that combine cognitive training with anxiety-reduction techniques may be particularly effective in enhancing performance.

The results concerning self-concept reveal a nuanced picture. Although a positive self-concept was significantly correlated with the use of study strategies, no significant associations emerged with organizational skills or time management. This may reflect the fact that self-concept influences more general attitudes toward learning rather than specific organizational practices. However, the strong correlations observed among study strategies, time management, and organizational techniques confirm their interdependence as core dimensions of self-regulated learning (Boekaerts, 1999). This interdependence suggests that educational programs should integrate these components holistically rather than treating them as separate skills.

A noteworthy and somewhat counterintuitive result emerged from the analysis of disordered eating behaviors. Regression analyses indicated that study strategies positively predicted disordered eating, suggesting that students who are



more engaged in structured learning may also be more vulnerable to maladaptive eating patterns. This paradoxical relationship may be interpreted through the lens of stress: students who invest intensively in academic success might experience heightened pressure, which in turn may manifest in unhealthy coping behaviors such as disordered eating (Ackard et al., 2006). By contrast, study strategies did not predict oppositional defiant behavior, indicating that different mechanisms underpin these two types of psychological difficulties. Taken together, these findings point to the necessity of nuanced and differentiated approaches in educational psychology, addressing both the benefits and potential risks associated with intensive academic engagement.

The study is not without limitations. First, the cross-sectional design prevents causal inference, and future research should employ longitudinal or experimental methods to establish directionality. Second, the reliance on self-report measures may have introduced response biases, particularly given the sensitivity of some constructs such as conduct problems or disordered eating. Third, while the sample was sufficiently large and diverse in terms of grade levels, its ethnic composition was relatively homogeneous, which may limit the generalizability of findings to more culturally diverse populations. Despite these limitations, the study offers robust statistical evidence supporting the centrality of cognitive and motivational variables in adolescent learning, and opens pathways for targeted interventions that combine cognitive training, motivational support, and emotional regulation.

## **6. Conclusion**

This study demonstrates that learning strategies, particularly cognitive and metacognitive ones, play a critical role in sustaining academic performance and reducing conduct-related difficulties among high school students. The findings highlight the protective function of structured study practices and underscore the importance of fostering self-regulated learning in secondary education. At the same time, the strong link between low academic motivation and conduct disorder points to the risks associated with motivational deficits, indicating the need for targeted interventions that separately address cognitive and motivational dimensions of learning.

The partial mediation observed between cognitive strategies, test anxiety, and academic performance reinforces the idea that emotional regulation is as important as cognitive training in optimizing educational outcomes. Moreover, the interdependence among study strategies, organizational skills, and time management confirms the necessity of holistic approaches to self-regulation. The unexpected association between study strategies and disordered eating suggests that high academic engagement may come with hidden costs, underscoring the need for balanced interventions that prevent maladaptive coping mechanisms.

In conclusion, effective educational practices in the teaching of psychology at the high school level should integrate cognitive, motivational, and emotional support. By promoting self-regulation, autonomy, and psychological well-being, such

approaches can contribute not only to higher academic achievement but also to healthier developmental trajectories for adolescents.

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## **Austerity In Romania In The Context Of Vulnerable Groups**

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### **Abstract:**

The fiscal and administrative austerity package introduced by the government in 2025 includes higher consumption taxes, reduced social protections, and stricter conditions for social benefits. A major measure is raising the standard value-added tax (VAT) from 19 % to 21 %, while setting a single reduced VAT rate of 11 % for essential goods and services — including food, medicines, thermal energy, water, and other basic necessities. These price increases disproportionately burden persons with disabilities, who often rely on fixed or limited incomes and may spend a larger share of their income on essentials such as medicines, utilities, and accessible housing. Furthermore, the austerity package introduces stricter controls on social benefit payments. According to recent legislative proposals, allowances for persons entitled to social support — such as disability allowances — could be subject to seizure to cover unpaid local taxes and fees. Thus, individuals with disabilities who depend on monthly indemnities may face increased financial insecurity, especially if they live in precarious economic situations or already struggle to meet living costs. At the same time, while some pensioners remain exempt from new health-insurance contributions (CASS), this exemption may not uniformly extend to all categories of social beneficiaries. The measures as necessary fiscal adjustments, persons with disabilities — given their often limited incomes, higher dependency on social allowances, and greater need for essential goods and services — are likely to be among the most negatively impacted groups.

**Keywords:** austerity, fiscal measures, vulnerable groups, disability, pensioners

### **1. Methodology**

The methodology of this study is based on the analysis of statistical data, using content analysis of major press releases, and a review of key legislative changes in Romania concerning the financing of specific forms of social support for vulnerable groups, particularly in the context of the 2005 budgetary crisis.

### **2. Introduction**

European Union Member States are free to design their own social protection systems. However, they are bound by a recommendation adopted by the European Council that calls for the alignment of social protection objectives and policies (Cornelisse& Goudswaard,2002). In industrialized countries, social protection has been delivered through regulations, tax incentives, and public expenditure (Tanzi,2002). Debates on social protection systems are frequently framed around the presumed trade-offs between economic growth and equity. Considerable attention is given to the ‘affordability’ of social programs and their potential impact on individual incentives to work and save (Arjona et.al, 2002). In recent years, the concept has been examined from a diverse array of perspectives, encompassing its role as a

macroeconomic stabilizer, a humanitarian response, a mechanism for risk management, and a means of advancing social justice (Gentilini&Omamo: 2011).

It is important to emphasize the strong relationship between social protection and the human rights framework, as access to adequate social protection is considered a fundamental aspect of the right to a secure livelihood, a right recognized in numerous international instruments, including the Universal Declaration of Human Rights. The core of this right lies in ensuring a minimum standard of livelihood—not necessarily income—for individuals facing circumstances that threaten their survival. Since the adoption of the UDHR, the principles of rights and sustainability in social protection provision have been advanced through various ILO Declarations. (Norton, Conway&Foster, 2002: 542).

In Europe, significant inequalities in the level of benefits provided by social security funds exacerbate polarization between highly protected and poorly protected beneficiaries. Moreover, income maintenance programs and the delivery of welfare services often operate within a particularistic-clientelist system, in which corruption and discretionary practices are widespread. (Petmesidou, 1996: 96). First outlined in 1895, the social security system in our country has undergone continuous development ever since, with its evolution consistently reflecting the changing needs of society (Marian, 2018).

The concept of vulnerable groups is used in sociological literature to designate social categories disproportionately exposed to economic, social, or institutional risks as a result of structural factors such as low income levels, limited access to resources, dependence on social transfers, or the existence of barriers to social and professional integration. Analyses focused on social policies emphasize that vulnerability should not be understood solely as an individual characteristic, but rather as the outcome of the interaction between socio-economic conditions and the ways in which public institutions distribute opportunities and social protection (Otovescu & Cioacă, 2019). From this perspective, identifying vulnerable groups requires the simultaneous assessment of economic, social, and institutional dimensions, as well as the risk of exclusion or marginalization in contexts marked by structural change or fiscal constraints.

In Romania, due to the absence of adequate social policies, the waste of already limited resources through the excessive provision of aid to certain groups negatively impacts those who are most in need of support from the social protection system and perpetuates the system's inefficiency in reducing poverty. Over-protection, in certain cases, generates significant social inequities (Preotesi, 2016).

A growing perspective in political discourse holds that social security systems should not be perceived as a constraint on a country's economic growth. Rather, when effectively designed and implemented, they constitute an essential economic instrument that fosters and sustains both economic and social development (Dobre-Baron, 2014: 56). The social protection system become fragmented, with unclear responsibilities between central and local authorities and opaque financing due to numerous central agencies. Healthcare access remains limited for low-income populations and rural areas, while the pension system, despite 2000 reforms, still

suffers from inequities, low coverage, and insufficient resources (Zaman, 2007). Also social contributions have an important impact on payroll policy. Also, social contributions represent a significant budgetary revenue item which can be viewed at the edge between taxation and insurance (Gyorgy, 2012). In Romania, this system comprises two main components: the public social insurance system and the social assistance system. The extent to which these two systems achieve their ultimate objective—namely, ensuring a decent standard of living for citizens—depends on the scope of coverage provided by social security benefits. This raises the question of “to what extent does the state effectively respond to the needs of vulnerable citizens?” (Dobre-Baron, 2012). Starting in the late 1960s, debates and controversies surrounding the so-called “social security crisis” increasingly shifted toward the financial dimensions of social protection systems. More specifically, attention centered on the growing imbalance between the revenues of social security schemes and their expenditures, and, consequently, on the gradual narrowing of the population covered by social security. (Dohotariu, 2015: 187).

Human rights considerations provide an essential normative framework for understanding social protection beyond purely economic or administrative perspectives. From this standpoint, social protection systems are not merely policy instruments but institutional mechanisms through which states operationalize fundamental social rights, including the right to social security, health care, and an adequate standard of living (Otovescu, 2009: 13-21). The European social model increasingly emphasizes rights-based approaches, linking social protection policies to principles of human dignity, social inclusion, and equality of opportunity. Consequently, the effectiveness of social protection systems should be evaluated not only in terms of fiscal sustainability or labour market incentives, but also according to their capacity to reduce structural inequalities, protect vulnerable groups, and ensure substantive access to fundamental human rights (Otovescu, 2009: 13-21).

## **2. Romanian security system**

Social security in Romania is legally regulated through a comprehensive framework of laws, public institutions, and policy instruments designed to ensure protection against major social risks. At its core, the Romanian social security system is grounded in the Constitution, which guarantees citizens’ right to social assistance and social insurance. This constitutional foundation is operationalized through a set of specialized laws that govern pensions, health insurance, unemployment benefits, and various forms of social assistance. Overall, the legal regulation of social security in Romania aims to balance financial sustainability with the need to ensure adequate protection for individuals facing social and economic risks. Despite continuous reforms, the system faces ongoing challenges related to demographic shifts, fiscal pressures, and the need to expand coverage and accessibility, particularly for marginalized populations.

## 2.1 Health system

The Romanian health care system operates as a social health insurance model and remains largely centralized, despite recent attempts to delegate certain regulatory responsibilities. It offers a comprehensive package of benefits to the 85% of the population that is insured, while the rest of the population is entitled to a basic set of services (Vlădescu, et.al., 2016). Romania continues to experience significant disparities in access to healthcare across different settings. Urban areas concentrate the vast majority of medical infrastructure, hosting 90.9% of all hospitals and hospital-type institutions, 92.3% of specialist outpatient clinics and hospital-affiliated outpatient services, 97.3% of medical dispensaries, 97.8% of dialysis centres, and 98.5% of specialist medical centres (Petre, et.al., 2023). A persistent characteristic of health systems in emerging economies is the chronic insufficiency of financial resources. This structural limitation has become increasingly pronounced in the context of recent economic crises, which have compelled many governments to reassess and, in numerous cases, reduce public expenditures allocated to the health sector. Consequently, health systems already operating under constrained budgets face heightened pressure to balance rising healthcare demands with limited fiscal capacity, further challenging their ability to ensure equitable access and maintain the quality and sustainability of services (Anton&Onofrei, 2012). Romania's hospital financing reform began in 1999 with the establishment of the Social Health Insurance System. This transition marked a shift away from historical, retrospective reimbursement methods toward per-diem payment mechanisms, and subsequently toward case-based payment models (Radu&Haraga, 2008). This raises the question: *what is the current context of health insurance in Romania?* Shortly after taking office, the Cabinet approved a package of strict fiscal and austerity measures, which sparked public discontent: tax increases, the freezing of pensions and salaries, and other measures considered unpopular. (Vasile, 2025, Radio Romania International). As a result, the government is confronted with a high degree of political instability. The implementation of unpopular economic measures, combined with persistent tensions within the ruling coalition and threats of resignation, alongside the looming possibility of a vote of no confidence, has generated a fragile and uncertain political environment. This climate poses significant challenges for governance, policy implementation, and the ability to maintain both public trust and coalition cohesion.

Thus, following the reforms of fiscal policies, as of September 1, over 600,000 Romanians will lose their health insurance coverage with the implementation of the new fiscal and budgetary measures. On the same day, the Bolojan Government assumed responsibility in Parliament for the second reform package, which comprises five major legislative initiatives (Toşa, 2025). Until now, co-insured individuals were covered by the social health insurance system without paying CASS. As of September 1, 2025, they will lose this coverage, but can opt for voluntary health insurance, according to Economica.net's analysis of the government-backed bill (Şomănescu, 2025). According to Legislația Muncii.ro, several groups including co-insured family members, certain pensioners, unemployed individuals, recipients of child-rearing or adoption leave, politically persecuted persons, and others previously

exempt—will now be required to pay CASS, with contributions withheld at source where applicable (<https://legislatiamuncii.manager.ro/a/31174/servicii-medicale-pentru-neasigurati.html>). In this broader context of austerity, according to published data, the budget of the National Health Insurance House increased from 1.8 billion lei in 1999 to 78.5 billion lei in 2025. Thus, over the past 25 years, the budget has increased more than 43-fold (Activity report 2024, National Health Insurance House).

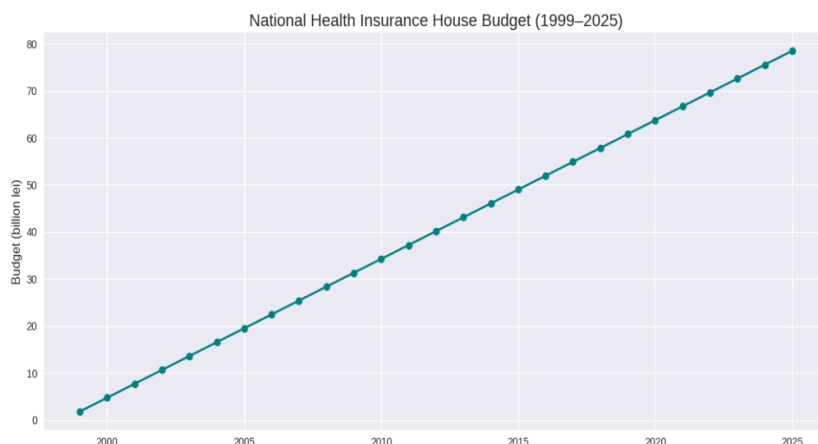


**Figure 1.** National Health Insurance House budget

*Source:* generated by author

From 1999 to 2025, the budget increases steadily from around 2–3 billion lei to nearly 80 billion lei, exhibiting an almost linear growth trend. This consistent rise suggests a stable budget projection without major fluctuations over the years. The data and corresponding chart can be utilized for predictive analysis or for comparing budget growth with GDP and social expenditures. Over the past two decades, the health care system has undergone multiple reforms with notable public health implications. Key measures include strengthening community and family medicine services, reducing the emphasis on tertiary care, launching National Health Programs, improving primary and emergency care, introducing DRG-based hospital payment, enhancing hospital management, implementing co-payments and health technology assessment for medicines, and increasing salaries for public-sector medical staff (Radu, et.al., 2021). Even so, under the new regulations adopted in 2025, the status of “co-insured” within the public health insurance system referring to individuals without their own income who were covered through a family member (such as a spouse, an unemployed parent, or persons on childcare leave, etc.) — has been eliminated. All these changes have a direct impact on access to publicly funded health services, including free or reimbursed consultations, diagnostic investigations, hospital care, and subsidized medicines. In the absence of voluntary re-enrollment in



the system, affected individuals are entitled only to a minimal benefits package, typically limited to emergency services, emergency hospitalization, and basic care. Moreover, per capita health expenditure in Romania is the lowest in the EU, and disparities in access disproportionately affect rural populations and individuals without official identification, including many members of the Roma community (see Figure no.2) (Truffa, 2025).

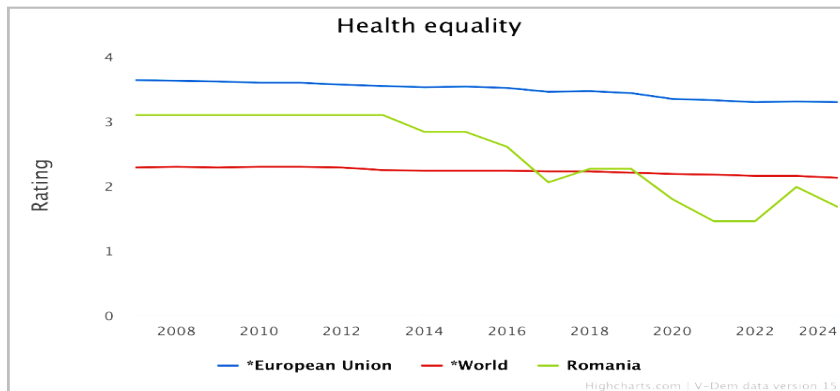


**Figure 2. Health inequality 2007-2024**

Source: [https://v-dem.net/weekly\\_graph/health-inequality-in-romania-2007-2024](https://v-dem.net/weekly_graph/health-inequality-in-romania-2007-2024)

The presented graph measures the level of health equality on a scale from 0 to 4 across three categories: Romania, the European Union (EU), and the global average, over the period from 2007 to 2024. The European Union (blue line) demonstrates consistently high levels of health equality, maintaining a rating close to 3.8–3.9 throughout the entire period. This reflects relatively equitable and stable access to healthcare services within member states. The global average (red line) remains relatively constant at approximately 2.2–2.3, indicating moderate global health inequalities that have not significantly shifted over the observed timeframe. Romania (green line) starts with a health equality rating slightly above the global average (around 3.1) in 2007–2012. However, from 2012 onwards, Romania exhibits a pronounced and steady decline in health equality, falling below 2 from 2018 onward, with minor fluctuations thereafter. By 2024, Romania's rating is notably below the global average, signifying a marked increase in health disparities. Romania's health equality has significantly deteriorated over the past two decades, placing it far below EU standards and even beneath the global average. This downward trend indicates growing disparities in access to healthcare services among various social and geographic groups within the country. In contrast, the EU maintains high and stable health equality, while global levels have remained relatively unchanged.

## 2.2 Pension system

The first organized forms of social protection in Romania, including pension systems, emerged in the second half of the 19th century and developed significantly until the interwar period, reflecting both the economic and social particularities of the time as well as European influences on social insurance (Iancu, 2003). Among the first institutionalized systems was the public servants' pension, provided by the state to ensure a minimum level of social protection for this professional category (Iancu, 2003). In the urban industrial environment, mutual associations and cooperatives also emerged, offering members financial protection in cases of illness, disability, or old age, representing an important step in the development of social insurance (Miclea, 2010). A significant legislative milestone was the adoption of Law no. 632/1912, considered the first modern framework regulating pensions for industrial workers, establishing conditions for old-age and disability pensions (Popescu, 1998). During the interwar period, legislation was extended to cover new professional categories and consolidate the principles of the public pension system (Năstase, 2005). Following the establishment of the communist regime in 1947, the pension system was nationalized and centralized, introducing a pay-as-you-go model in which pensions were calculated based on years of service and average salary, and the right to a pension became universal for all employees (Ionescu, 2012). After 1989, Romania undertook major pension reforms aimed at sustainability and modernization. Key changes included:

- Introduction of multiple pillars (state, private, and voluntary pensions).
- Gradual transition from a purely pay-as-you-go system to partially funded schemes.
- Adjustments to retirement age and benefits to align with European standards (Ciutacu & Radu, 2016).

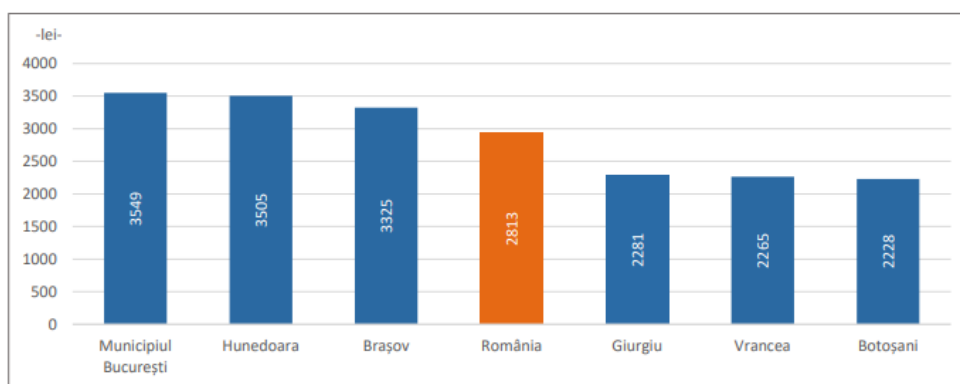


**Figure 3.** Maximum and minimum values of the average monthly state social insurance pension by territorial profile, in the second quarter of 2025

Source:

[https://insse.ro/cms/sites/default/files/com\\_presa/com\\_pdf/pensii\\_tr2r2025.pdf](https://insse.ro/cms/sites/default/files/com_presa/com_pdf/pensii_tr2r2025.pdf)

The chart highlights the average variations of the monthly state social insurance pension across various regions and municipalities in Romania for the second quarter of 2025, measured in lei. The Municipality of Bucharest records the highest average monthly pension, amounting to 3549 lei. This result can be attributed to the higher cost of living and wages in the capital, reflecting a possible correlation between pensions and the region's economic level. Hunedoara County and the Municipality of Braşov follow with similar average pensions of 3505 lei and 3325 lei, respectively, both exceeding the national average. The average monthly pension value for the entire country is 2813 lei, representing an important reference point for territorial comparisons. Giurgiu (2281 lei), Vrancea (2265 lei), and Botoşani (2228 lei) counties present the lowest average monthly pension values, below the national average. This aspect may indicate significant regional economic and social disparities, possible discrepancies in demographic structure, or differences in employment levels and contributions to the social insurance system. The difference between the maximum average monthly pension (Bucharest, 3549 lei) and the minimum (Vrancea, 2265 lei) is approximately 1284 lei, suggesting an unequal distribution of pensions across Romania's territory.

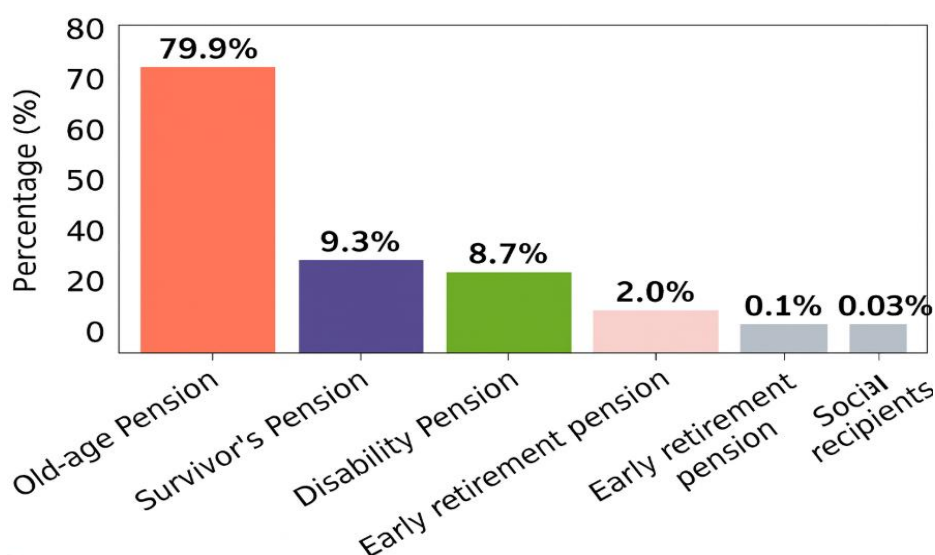


**Figure 4.** Distribution of pension and social benefit categories in Romania (2024)

Source: Generated by the author using data from National Institute of Statistics

[https://mmuncii.gov.ro/wp-content/uploads/2025/10/Pensii-trim\\_1-2025.pdf](https://mmuncii.gov.ro/wp-content/uploads/2025/10/Pensii-trim_1-2025.pdf)

The bar chart illustrates the proportional distribution of individuals across various pension and social-benefit categories. The data reveal a highly uneven structure, with one category dominating the overall composition. The Old-age pension category accounts for 79.9% of all beneficiaries, indicating that the pension system is primarily oriented toward supporting the elderly population. This

overwhelming share suggests both a mature demographic profile and a significant dependency ratio, which may have long-term implications for the sustainability of the pension system. The next two categories—Survivors' pensions (9.3%) and Disability pensions (8.7%)—represent substantially smaller but still meaningful proportions. Their combined share of approximately 18% highlights the system's secondary role in providing financial protection for individuals affected by the loss of a family provider or long-term health limitations. The remaining categories contribute only marginally to the total. Partially early retirement pensions (2.0%) **and** Early retirement pensions (0.1%) together form a negligible segment, suggesting that early exit from the labor market is either tightly regulated or less commonly utilized. Finally, Social benefit recipients (0.003%) constitute an almost imperceptible fraction, underscoring that non-contributory or welfare-based support plays a minimal role within this dataset. Overall, the distribution demonstrates a system heavily concentrated on traditional old-age support, with other forms of pensions and benefits playing comparatively minor roles. This pattern may reflect demographic pressures, policy priorities, or structural characteristics of the national social security framework.

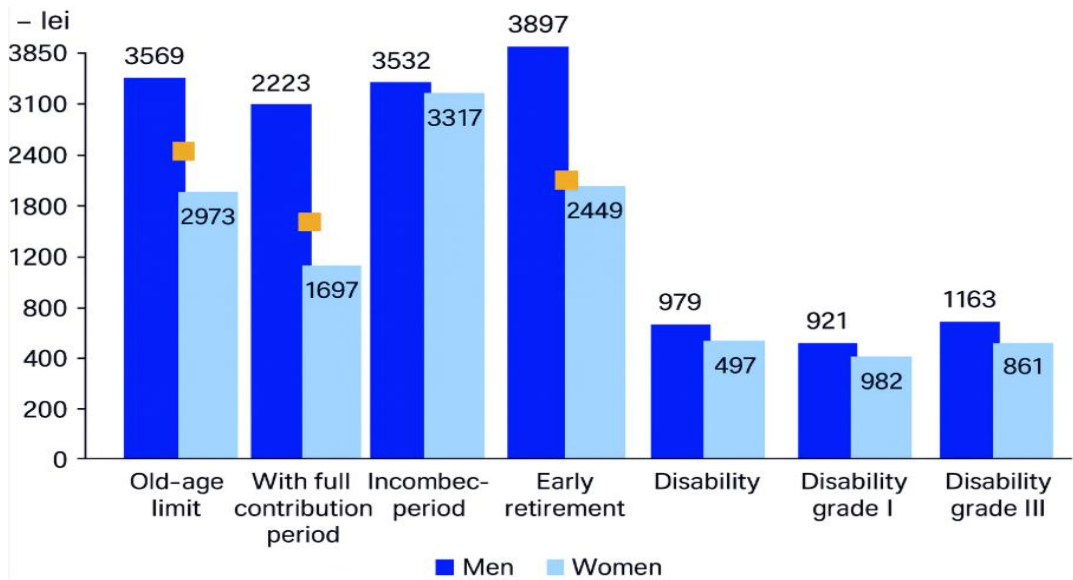


**Figure 5.** The average social insurance pension, by pension category and sex, in the year 2024

Source: Generated by the author using data from National Institute of Statistics  
[https://insse.ro/cms/sites/default/files/field/publicatii/numarul\\_de\\_pensionari\\_si\\_pensia\\_medie\\_lunara\\_in\\_anul\\_2024\\_0.pdf](https://insse.ro/cms/sites/default/files/field/publicatii/numarul_de_pensionari_si_pensia_medie_lunara_in_anul_2024_0.pdf)

The bar chart presents a comparative overview of pension amounts received by men and women in Romania across seven distinct categories: old-age limit, full contribution period, incombec-period, early retirement, general disability, disability grade I, and disability grade III. The data reveals consistent gender-based disparities, with men generally receiving higher pension benefits than women, except in one category. In the old-age limit category, men receive 3569 lei, while women receive 2973 lei, indicating a gender gap of nearly 600 lei. This discrepancy is further accentuated in the full contribution period category, where men earn 2223 lei compared to 1697 lei for women. These differences suggest systemic inequalities in lifetime earnings and contribution histories, potentially influenced by labor market segmentation and gendered career trajectories. The incombec-period category shows a narrower gap, with men receiving 3532 lei and women 3317 lei. This relative parity may reflect more uniform eligibility criteria or benefit calculations within this specific pension scheme. The most pronounced disparity is observed in the early retirement category, where men receive 3897 lei and women only 2449 lei, a difference of nearly 1450 lei. This may be attributed to differential penalties, shorter contribution periods, or lower average wages among women. In the general disability category, men receive 979 lei, nearly double the 497 lei received by women. However, in disability grade I, women surpass men slightly, receiving 982 lei compared to 921 lei. This reversal, albeit modest, suggests that in cases of severe disability, benefit calculations may be less influenced by gendered economic factors.

In 2025, fiscal measures targeting retirees in Romania include the reintroduction of the health insurance contribution (CASS) at a rate of 10% for pensions exceeding 3,000 RON, effective from August 1, 2025, as well as a 10% income tax applied to taxable income after deducting CASS. Additionally, existing legislation provides a tax exemption for pensions below 2,000 RON, in accordance with earlier regulatory acts. Ongoing discussions regarding the introduction of new tax brackets under Law 141/2025 further indicate potential adjustments to pension taxation. Collectively, these measures have a direct impact on net pension income, as established by the provisions of the National House of Public Pensions (CNPP) and the Romanian Fiscal Code.

### **2.3 Disability system protection**

Romanian legislation has undergone significant developments over recent decades to promote the inclusion of individuals with disabilities. Law no. 448/2006, concerning the protection and promotion of the rights of persons with disabilities, provides for social protection measures, fiscal incentives, and guarantees the rights to education and employment. Nevertheless, substantial challenges remain, including inadequate accessible infrastructure and the persistence of social stigma (Ionescu, 2020). Inclusive education is an area in progress, yet schools continue to face difficulties in adapting curricula and preparing teaching staff to address the special needs of students (Popescu & Marin, 2019). Furthermore, access to the labor market remains limited: the employment rate for persons with disabilities is significantly

lower than the national average, and discrimination based on disability persists (World Bank, 2021).

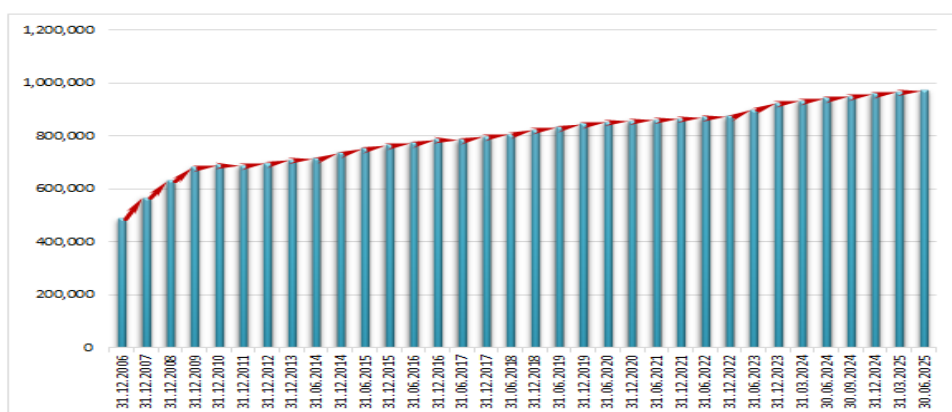


**Figure 6** The evolution of the number of persons with disabilities, December 2006 – June 2025

Source: National Authority for the Protection of the Rights of Persons with Disabilities <https://anpd.gov.ro/web/transparenta/statistici/>

In Romania, the number of individuals with disabilities has steadily increased in recent years. In 2014, approximately 738,000 people were officially registered as having a disability, and by 2025 this number had reached 973,079. This growth reflects both the aging of the population and the increasing prevalence of chronic illnesses, as well as more effective formal recognition of disabilities. The majority of individuals with disabilities live with their families or independently, with only a small proportion residing in institutional care. In terms of severity, nearly half are classified as having severe or pronounced disabilities, while the remainder fall into the moderate or mild categories. Overall, persons with disabilities represent approximately 4–4.5% of Romania's population. The continuing upward trend highlights the need for targeted social and healthcare policies designed to promote inclusion, support, and equal opportunities for this population.

In contrast with broader European trends, which generally aim to facilitate mobility and independence for persons with disabilities through inclusive policies and streamlined procedures, in 2025 the National Authority for the Protection of the Rights of Persons with Disabilities (ANPDPD) approved, through Order 312/2025, a procedure for the reevaluation of adults classified with a disability who hold a valid driving license and possess a disability certificate issued for conditions deemed incompatible with the right to drive. This measure, while intended to ensure safety and compliance with legal standards, represents a more restrictive approach compared to many EU member states, where emphasis is placed on supporting autonomy and minimizing bureaucratic barriers for individuals with disabilities. Thus, the press has reported cases of abuse based on this order, with such abuse

manifested through forced reevaluations of individuals with irreversible disabilities according to stirileprotv.ro, there were cases, for example, tetraplegic individuals who could not be transported to the evaluation committee, yet were still required to appear (Vieru & Curea, 2025). During the reevaluation process, social rights (allowances, benefits, reimbursements, etc.) are suspended, which for some has resulted in tangible losses—for instance, an individual from Tulcea County reported being deprived of their annual fuel reimbursement for a period of eight months (Bigea, Agerpres, 2025). Some beneficiaries were compelled to “choose between their disability classification and their driving license,” meaning they had to forfeit their disability certificate in order to retain their license. Such a situation is entirely unacceptable in a European state. Evaluations were applied on a wide scale, not only to cases deemed “incompatible with driving,” but also to individuals with physical disabilities, the elderly, and the deaf—an approach which, according to certain organizations advocating for the rights of persons with disabilities, exceeds the legal framework and results in injustices. (Rusu, Radio România, 2025). In response to the precedent established nearly 20 years earlier (2006), when Romania enacted a law guaranteeing the protection of persons with disabilities (Law 448/2006), organizations advocating for the rights of persons with disabilities, such as the National Council for Disability in Romania (CNDR), have indicated that the procedure does not provide sufficient guarantees of transparency and fairness, and that adequate protections for vulnerable individuals are not ensured (National Council for Disability in Romania –CNDR, 2025). In addition to the “forced” reevaluation based solely on the possession of a driving license, even when the disability does not prevent the individual from operating a vehicle, the new fiscal austerity measures have resulted in situations where persons with disabilities can no longer have their rights, guaranteed under Law 448/2006, fully respected.

Thus, due to the austerity measures imposed by the Bolojan government, the National Council for Disability in Romania (CNDR) issued an open letter to the Government and Parliament, warning that the elimination of tax exemptions for persons with severe or pronounced disabilities from property, land, and vehicle taxes constitutes a “major regression” in the protection of the most vulnerable National (Council for Disability in Romania (b) (2025). According to Agerpres, the provision that allowed local councils to grant additional tax reductions or exemptions to persons with disabilities is also being eliminated. This measure effectively removes a layer of local discretion that previously enabled municipalities to tailor support according to the specific needs of residents with disabilities. From a legal and social perspective, this raises concerns regarding the protection of constitutionally guaranteed rights and international obligations under the UN Convention on the Rights of Persons with Disabilities. The loss of locally determined fiscal relief may exacerbate economic vulnerability, reduce autonomy, and limit access to essential services, thereby undermining efforts to promote social inclusion and equality for persons with disabilities (Agerpres, 2025).

### 3. Conclusions and Discussion

The fiscal and budgetary measures implemented by the Bolojan government have had significant consequences for vulnerable populations in Romania, particularly pensioners and persons with disabilities. Pensioners, often reliant on fixed and limited incomes, face an increased financial burden due to the elimination or reduction of certain tax exemptions and the rise of local taxes. These additional costs reduce their disposable income, limiting their ability to meet basic needs such as food, medicine, and housing maintenance, and potentially increasing the risk of poverty and social exclusion.

For persons with disabilities, the impact is even more pronounced. The removal of tax exemptions on properties, land, and vehicles diminishes both economic autonomy and access to mobility, persons with disabilities are being forced to choose between retaining their driving license. Those with severe or pronounced disabilities, who previously relied on such fiscal support, may be forced to bear additional costs that threaten access to essential services and social inclusion. Coupled with measures such as the forced reevaluation of disability certificates, these austerity policies exacerbate uncertainty and vulnerability. Importantly, these measures jeopardize the rights guaranteed under Law 448/2006, representing a significant regression in legal protection for persons with disabilities.

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# **Subsidized Autonomy: Funds Allocated By The Romanian State To The Hungarian Democratic Union Of Romania (Udmr) Through The Council Of National Minorities (1994-2025)**

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## **Abstract:**

*This article examines the hypothesis that the Hungarian Democratic Union Of Romania (UDMR) has pursued a long-term ethnopolitical strategy aimed at gradually enforcing an autonomous regime in certain parts of Transylvania, a process indirectly sustained through public funding allocated by the Romanian government itself. The research is based on a Freedom of Information request submitted under Law 544/2001 to the Department for Interethnic Relations (DRI), which provided an official record of all state subsidies granted between 1994 and 2025 to organizations representing ethnic minorities in Romania. The dataset reveals that UDMR and its affiliated structures received over 662 million lei, equivalent to approximately 133 million euros in today's value, during this period. These funds have been adjusted for inflation and analyzed in correlation with the evolution of the national currency to assess their real economic impact. The study argues that this continuous financial support facilitated the consolidation of an informal system of parallel institutions, cultural networks, and local power structures in Transylvania, contributing to a de facto form of autonomy in Hungarian-majority areas. The article situates these findings within the broader theoretical frameworks of desovereignization and internal borders, contextualizing them through UDMR's historical trajectory, policy positions, and recent public statements advocating for the autonomy of the so-called "Szeklerland." The results highlight a paradoxical dynamic in which state-funded mechanisms reinforce ethnopolitical separatism under the guise of cultural support.*

**Keywords:** Transylvania; borders; ethnocracy; autonomy; subsidies.

## **1. Introduction**

Since the 1990s, the Hungarian Democratic Union of Romania (UDMR) has established itself as the main political and cultural organization of the Hungarian minority, with an almost uninterrupted presence in parliament and government. Currently representing less than one million citizens according to the 2021 census, or approximately 6% of the population, UDMR has participated in multiple governing coalitions, assuming the status of "political arbiter" to advance Hungarian interests in Transylvania. Although this role has ensured constant representation of Hungarians at the central level, some analysts argue that UDMR has gone beyond the framework of the Romanian Constitution, acting as an instrument for autonomy in the region, often supported directly by a foreign government, that of Hungary to be precise. This plan involves the gradual desovereignization of Romania in areas with Hungarian populations, by obtaining step-by-step ethnopolitical concessions which, when combined, weaken the Romanian state's authority within its own territory. The strategy is called *the "policy of small steps"* (Kantor, 2013), indicating the incremental

achievement of autonomist goals, so that each separate step seems minor and legitimate, but the cumulative effect leads to the creation of a *de facto* autonomy.

The quest for autonomy by the Democratic Alliance of Hungarians in Romania (UDMR) in Transylvania has developed within a framework that both challenges and benefits from the institutional mechanisms of the Romanian state. This paper explores a paradoxical dynamic that is frequently ignored in official discourse. The analysis raises concerns regarding the relationship between state support and minority mobilization by examining how claims for autonomy have been expressed and promoted through avenues that require systemic involvement.

Theoretically, the operational foundation of any autonomist movement is the availability and mobilization of financial resources, which goes beyond political rhetoric and symbolic gestures. One of the main, though not the only, sources of funding for the Democratic Alliance of Hungarians in Romania (UDMR) has been the state budget, which has been crucial in maintaining institutional and community-level initiatives related to autonomy claims.

Further, throughout this paper, the particular issue of direct state-funded financial support will be addressed: between 1994 and 2025, UDMR and its affiliated foundations received hundreds of millions of lei from public funds, money directed annually from Bucharest under the pretext of supporting cultural identity through the Council of National Minorities and its predecessor structures. In fact, these sums have fueled a parallel institutional network, an ecosystem controlled exclusively by UDMR, which has gradually replaced the presence and authority of the Romanian state in counties with a Hungarian majority population.

The purpose of this paper is to demonstrate that the autonomy promoted by UDMR is an autonomy subsidized by the Romanian state, where the state entity finances a group that openly advocates for territorial dismemberment and local autonomy. The Romanian state was not passive, but a sponsor; it was not deceived, but an accomplice through its lack of rigor and absence of control. These funds, vaguely justified and used in a non-transparent manner, have allowed the consolidation of UDMR's hegemony in Hungarian communities and have created the material basis for an identity project disguised as minority protection. In other words, Romania paid from its own budget for the symbolic and institutional deconstruction and its own marginalization in Transylvania, this financial dimension of autonomy must finally be exposed in clear, quantifiable, and verifiable terms.

Research on ethnic communities indicates that collective identity is reproduced not only through symbolic narratives, but also through organizational infrastructures that sustain cultural continuity and community cohesion. In this perspective, processes of identity reconstruction depend on institutional networks (associations, media, educational and cultural initiatives) and on the resources that enable their ongoing functioning, especially under conditions of geopolitical pressure and interethnic competition. Consequently, public funding mechanisms may operate as instruments of cultural preservation and participation, but they can also become structural enablers for the consolidation of parallel community ecosystems,

depending on their transparency, governance, and political capture (Otovescu, Păsătoiu, & Cioacă, 2020).

## 2. Theoretical Framework

**Sovereignty vs. desovereignization.** In the classical sense, state sovereignty implies the unrestricted exercise of authority on national territory, without external interference in internal affairs. Any illegitimate transfer of authority, whether to external entities or to parallel unconstitutional structures, amounts to a loss of sovereignty. Sociologist Dan Dungaciu has addressed the concept of Romania's "desovereignization" in Transylvania, describing how the authorities in Budapest act directly through UDMR, bypassing the Romanian state, in order to impose their own agenda in this region (Dungaciu, 2020). We observe how "the Hungarian government's direct partner in Transylvania is UDMR; Budapest decides the direction, UDMR executes the plan, and Budapest moves on to implementation", a relationship through which the Hungarian state acts "without intermediaries" on the territory of another state, diminishing its sovereignty (Baltasiu, 2019). Essentially, Budapest is arrogating powers and rights that it does not have over Transylvania, taking advantage of the passivity of the authorities in Bucharest. Thus, the Hungarian state is gradually "inserting" its presence in Transylvania, without any explicit permission, attribution by attribution, in the face of silences that become tacit acceptances (Baltasiu, 2020: 15). This gradual dynamic is vividly captured by Dungaciu through the metaphor of physical intrusion:

"First it sticks in its nails, then all its fingers, then its whole hand, followed by its arm (...) up to the shoulder"

until Hungary's presence on the ground becomes so solid that it claims to be recognized as a co-decision-maker in the internal affairs of the area. Conceptually, we are facing a de facto "co-sovereignty" of Transylvania: the authority of the Romanian state is partially replaced by the authority of UDMR-Budapest network.

**Internal borders and ethnocracy.** Theorists of border geopolitics (Ilie Bădescu, Radu Baltasiu, etc.) have analyzed the phenomenon of ethnic segregation and the emergence of "internal borders" in multi-ethnic societies. In the monumental work "Sociology and Geopolitics of the Border", we observe that Transylvania manifests a "Hungarian geopolitical paradigm" that treats this province as part of *the* Hungarian "Carpathian Basin", while the Romanian state has neglected to develop its own internal geopolitics. The consequence is that the Romanian space comes under the influence of a foreign geopolitical logic: *"the Romanian border moves inward"* when the Hungarian community in Transylvania is drawn to the periphery of Hungary through the construction of local autonomies based on ethnic criteria. This paper also explains the resulting phenomenon of "country within a country", which leads to the emergence of *"exclusive minorities"*, ethnic communities that disconnect themselves from the national context and develop their own parallel structures. This form of ethnocracy (the domination of ethnic logic to the detriment of common citizenship) erodes state cohesion, as the loyalty of the minority population is diverted to ethnic leaders and, implicitly, to another state. Ultimately, the state tacitly

renounces its attributes of sovereignty in those areas, leaving room for a form of unofficial autonomy. Bădescu (1995) summarises this process as

“the entry of the Romanian border into the non-Romanian geopolitics of the Carpathian Basin”

In other words, Bucharest is outsourcing some of its functions to UDMR and Budapest.

**“The policy of small steps”.** This gradual strategy was identified by Romanian observers as early as the 1990s as part of the post-Trianon Hungarian revisionist project. It consists of a succession of progressive claims and actions, each presented as benign or as an act of justice for the minority, but which cumulatively advance the goal of autonomy. The most obvious example is the evolution from cultural rights to territorial claims: initially, the use of the Hungarian language in administration and education was requested, then their own symbols (the Szekler flag, the Szekler anthem) in public spaces, then statutes of cultural autonomy, and now there are explicit demands for territorial autonomy for the so-called “Szeklerland”. Each “small step” has set a precedent and pushed the limits of acceptability further. Romanian analysts believe that UDMR and its partner organizations (the Szekler National Council – CNS, the Bethlen Gabor Foundation, etc.) have acted in a coordinated manner in this direction, periodically testing the vigilance of the Romanian state. A pattern of action by the Orban government is noticeable: Budapest takes advantage of Bucharest’s weaknesses and passivity “*an introverted, reactive state with no plan*” (Dungaciu, 2020) to impose a policy of *fait accompli* in Transylvania, to the point where challenging these gains becomes difficult or too late. This gradual tactic explains why autonomy based on ethnic criteria, although firmly denied by the Romanian Constitution, continues to reappear in public discourse: each preliminary element, such as schools, universities, separate funding, symbolism, Hungarian citizenship, etc., was obtained separately and presented as harmless, but all together they outline the infrastructure of full autonomy.

### 3. History of Funding

A key aspect of the influence strategy is the financial resources made available to UDMR and the institutions it controls. Paradoxically, a large part of these resources came from the Romanian state itself, through mechanisms for financing national minority organizations. Based on legislation adopted after 1994, UDMR, as a cultural union of citizens of Hungarian nationality, receives substantial public funds annually. While in the mid-1990s the amounts were modest, for example, in 1994 UDMR received ~180 million old lei (approx. 18,000 lei in current value) (as presented in DRI Address no. 925/23.05.2025), in subsequent years the funding increased exponentially. In 2010, UDMR received approximately 15.18 million lei from the budget, an amount ~39 times higher than in 2000. The upward trend has accelerated recently: the period 2019-2025 has seen a doubling of allocations for Hungarian organizations, from approximately 29.4 million lei in 2019 to ~64.3 million lei in 2025. Double-digit annual increases have been recorded consistently (e.g., +24% in 2022, +12% in 2023), so that UDMR and affiliated foundations such as the Communitas Foundation and the Hungarian Cultural Society of Transylvania (SMCT)

now account for more than a fifth of the entire budget allocated to minorities. In other words, the Romanian state generously finances the cultural and educational infrastructure of the Hungarian minority through schools, publications, events, and higher education institutions, in a declared effort to ensure the preservation of ethnic identity and interethnic peace. and in addition to this state infrastructure, millions of lei are granted annually to a political party for non-transparent expenses and its own objectives.

Some theorize that this funding is often granted by the authorities in Bucharest in the hope that it will “buy ethnic peace”, thus preventing the radicalization of separatist movements and offering the Hungarian community the satisfaction of concrete rights and resources. However, the price paid was the consolidation of informal autonomy under the control of UDMR. With substantial funds at its disposal and monopolizing their distribution to schools, NGOs, and Hungarian-language media, UDMR has managed to control almost entirely the public life of Hungarians in Transylvania. UDMR leaders often made the allocation of resources conditional on political support, creating a “totalitarian communist-style unity” among the Hungarian electorate, as accused by political rivals within the community (PPMT, PCM) (Cosmeanu and Balogh, 2005). By stifling alternative funding, any internal opposition to UDMR was marginalized, and the organization imposed its political hegemony over the entire minority.

At the same time, direct financial support from Hungary increased exponentially after 2010 as part of Viktor Orbán’s policy of strengthening ties with *Hungarians abroad*. The Hungarian government, through funds such as the *Bethlen Gábor* Foundation, has invested heavily in Transylvania: it has financed churches, schools, and kindergartens, Hungarian farms and NGOs, awarded scholarships to pupils and students, and even sponsored local sports teams (Macarie, 2018). For example, in Satu Mare County, the Hungarian state carried out projects worth ~€9 million between 2017 and 2020, targeting the Hungarian community, while the Romanian state invested ~€419 million in the same county (2015–2020). Even though the figures show a much greater contribution by Bucharest to local development, the community’s perception is often the opposite: interviews with people from areas governed by UDMR (Democratic Union of Hungarians in Romania) state that

“the Hungarian state is 100% more present than the Romanian state (...). Hungary invests, it wants to show that in Transylvania there is something Hungarian above the Romanians. The Romanian state is not very present, I don’t understand why” (Baltasiu, 2020: 37).

These perceptions confirm the long-term strategy in the predominantly Hungarian-populated counties of Transylvania, where the Pro Economica Foundation, funded by the Hungarian government, has awarded thousands of grants to Hungarian farmers, strengthening economic dependence on Budapest. Romania has generally tolerated these capital infusions, even supplementing them with its own funds, but without clear coordination and concrete evidence of the neighboring state’s investments (Scarlat, 2022). The result is the emergence of areas where the Romanian state’s presence feels diluted, and the population’s loyalty goes



predominantly to the leaders of UDMR and, implicitly, to Hungary. In practice, Bucharest has ended up indirectly subsidising its own marginalisation through internal funding and the acceptance of external funding, fueling the development of a parallel system in which UDMR and Hungary dictate local politics, while the Romanian authorities are mere spectators.

#### 4. UDMR's Ethnopolitical Strategy

UDMR has officially defined itself as a cultural organization of the Hungarian minority, but it acts *de facto* as an ethnic party with well-defined political objectives. Its ethnopolitical strategy combines participation in government to obtain leverage and resources with identity activism to meet the community's expectations regarding autonomy. UDMR has skillfully sought to maximize the advantages in both directions: on one hand, it has been a relatively moderate and predictable partner in the governing coalitions in Bucharest, avoiding direct confrontations on sensitive issues in exchange for obtaining discreet legislative benefits; on the other hand, it maintained an autonomist discourse at the local and international levels, constantly supporting the need for *cultural autonomy* and even a form of *regional autonomy* for Hungarians in Transylvania. (For example, UDMR is one of the initiators of the ICE Minority Safe Pack, alongside other autonomist groups in the European Parliament.)

An important tactic was to use to their advantage positions in the central administration to promote the interests of the minority. In the governments after 1996, UDMR held portfolios (culture, environment, development, etc.) and positions (deputy prime minister, secretaries of state, county prefect) through which it was able to direct public policies and funds to areas with Hungarian populations. Its influence in the state apparatus was complemented by intense legislative lobbying: UDMR initiated or supported laws such as the Education Law (which extended the right to mother-tongue instruction at all levels), the Local Public Administration Law (which formalized the use of Hungarian in local institutions in territorial-administrative units where Hungarians exceed 20%) and projects for the establishment of confessional educational institutions in Hungarian (see the case of the Roman Catholic Theological High School "II. Rákóczi Ferenc" in Târgu Mureş). Each of these achievements was presented as a gesture of democratic normality, but also strengthened the infrastructure of a cultural autonomy.

At the same time, UDMR exercised an informal *political veto* by systematically blocking initiatives considered contrary to the interests of the Hungarian community. For example, it opposed administrative reorganizations that would have dissolved the identity of the so-called "Szeklerland" by including the counties of Harghita and Covasna in a larger region and protested against the creation of a Hungarian-language educational institution in the county of Harghita (Economedia, 2024), protested against the adoption of *the Day of the Treaty of Trianon* as a national holiday (Andrei, 2020) seen as an affront to the Hungarian community, and internationalized disputes over language rights, appealing to European organizations to put pressure on Romania (Popescu, 2024). This dual attitude, cooperative at the center and combative at the periphery, has generated the perception of a double

agenda on the part of UDMR. Within the Hungarian community, UDMR leaders have cultivated nationalist and conservative ideas, constantly evoking the ideal of autonomy, but without excesses that would jeopardize the Union's position in the government.

It should be emphasized, however, that UDMR was not just a passive beneficiary of Budapest's plans, but an active actor. Numerous actions support this assertion, such as frequent and unofficial consultations between UDMR leaders and Hungarian officials, the participation of members of the Hungarian government in political events on Romanian territory alongside UDMR, and the synchronization of messages and demands. A telling example is the habit of Hungarian Foreign Minister Péter Szijjártó of holding press conferences at UDMR headquarters in Transylvania, side by side with Union leaders, an unusual gesture whereby a foreign dignitary uses the platform of a local party to convey political messages. *Hungarian officials speak to Bucharest from the headquarters of a political party in Romania*, even though such a practice defies diplomatic protocol and amounts to interference in internal politics (UDMR, 2022). In the same spirit, Budapest has encouraged Hungarian parties in Romania to demand autonomy and has sent high-ranking emissaries to separatist events to give these actions international weight (Hot News, 2018). Far from dissociating itself, UDMR has always been a co-organizer and host, signaling its alignment with the objectives set by the "mother country".

This paradoxical situation, in which a party in power in Romania collaborates with a foreign government against the interests of its own state, is a source of tension at the regional level (Agerpres, 2025). In other words, formally, UDMR and its members of parliament swear allegiance to Romania, but on the European stage or at political meetings, it challenges Bucharest's policies, posing as *a victim* to justify demands for territorial autonomy. This duplicity has eroded trust between the majority and the minority, fueling suspicion that UDMR is acting as Hungary's "Trojan horse" within the Romanian state apparatus (Popescu, 2012).

Over the years, UDMR has adapted its public discourse to suit its audience. In front of the Hungarian electorate, it has kept alive the ideal of autonomy, albeit in cautious terms: *"cultural autonomy"*, *"local self-government"*, *"special regional status"*, etc. In front of its Romanian government partners, it has adopted a moderate tone, insisting that it only seeks *"respect for the rights enshrined in the Constitution and international treaties"*. However, programmatic documents such as the "Cluj Declaration" (1992) or the resolutions of UDMR Congresses explicitly mention the goal of *"territorial autonomy for the Hungarian community"*. Even though UDMR leaders have avoided putting forward an official autonomy bill themselves in the last decade so as not to risk political isolation, they have left this task to satellite organizations and associated parliamentarians. For example, in December 2023, two deputies elected on UDMR lists but members of another party, Zakarias Zoltan and Kulcsar-Terza Jozsef Gyorgy from the Hungarian Alliance of Transylvania (AMT) and the Hungarian Civic Force (FCM), respectively, submitted three bills on the autonomy of the so-called "Szeklerland", both territorial and cultural, formally on their own initiative (Eremia, 2023). However, it is difficult to believe that this move was not

known and tacitly approved by the Union's leadership. Through such indirect actions, UDMR maintains its position of possible denial in front of its Romanian political partners, but simultaneously conveys to the Hungarian community that it has not abandoned its ultimate goal.

### **5. Financial allocations to UDMR and lack of transparency**

Between 1994 and 2025, the Hungarian UDMR party and the organizations it controls, namely the Hungarian Cultural Society of Transylvania (SMCT) and the *Communitas* Foundation, received hundreds of millions of lei from the state budget, according to data provided by the Department for Interethnic Relations (DRI address no. 925/23.05.2025). This funding is part of the Romanian state's general policy of supporting national minority organizations with a view of "protecting cultural and linguistic identity". However, the case of UDMR is distinguished both by the high level of funds received and by the lack of transparency in their management. Between 1994 and 1996, UDMR received the funds directly, then in 1997, UDMR and the Hungarian Cultural Society of Transylvania (SMCT) received part of the funds, with the SMCT taking over the funding in 1998-2000. In 2001, the funds were divided between the SMCT and the *Communitas* Foundation, with the latter taking over the funding between 2002 and 2008. Since 2009, UDMR, as the representative organization of the Hungarian minority, has taken over the management of these funds, effectively replacing the previous role played by the *Communitas* Foundation. Thus, between 2009 and 2025 alone, UDMR received over 330 million lei directly, while the budget allocated to national minorities increased from 143 million lei in 2020 to 296 million lei in 2025. UDMR has benefited from a constant percentage of 21-22% of this total, making it the largest beneficiary among all minority organizations.

However, journalistic investigations indicate an extremely low level of transparency. According to an investigation by Átlátszó Erdély, in 2016, UDMR refused to provide public data on the use of the money, arguing that it was not subject to the provisions of Law 544/2001 on access to information of public interest. The journalists' requests were rejected, even though the managed funds came exclusively from the state budget. The situation even led to legal proceedings to clarify UDMR's obligations in terms of transparency. However, journalists managed to gain access to the documentation submitted by UDMR to the DRI for a short reporting period. This documentation showed that the amounts allocated were justified summarily, often by a single one-page form (Form A3), in which expenses of hundreds of thousands of euros were described in a few words (Sipos, 2016). For example, the purchase of a €200,000 property in Bucharest was described by the phrase "Bucharest property", with no supporting documents, contract, or land registry extract.

Other examples show unusual costs: in 2012, UDMR declared travel expenses of over €90,000, equivalent to 12,000 days of travel within the country. In the same year, €145,000 was spent on fuel, equivalent to over 110,000 liters of fuel, enough to travel 36 times around the Earth. The salaries of UDMR staff have increased significantly, with the number of employees doubling between 2009 and 2015,

reaching 168 in 2015. Management salaries are significantly above average, given that many positions are part-time. UDMR has also consistently purchased cars and real estate with public funds. Between 2009 and 2015, UDMR bought 24 cars, including a €51,000 VW Multivan and a Honda Accord for the party leader. UDMR's headquarters have benefited from massive investments. In 2011, €1.9 million was spent on maintenance and renovations alone, an amount that theoretically and realistically far exceeds what would be logically necessary for 40 headquarters, most of which are modest in size.

Following pressure from the independent press, in 2016 UDMR and the Communitas Foundation tentatively began to publish some data but refused to respond to official requests for public information. The case went to court, with journalists asking whether UDMR is obliged to comply with Law 544/2001 on access to public information (Sipos, 2019). At the same time, the verifications carried out by the Department for Interethnic Relations are limited to the consistency of the figures, without analyzing the legality or structure of the expenses. The Court of Auditors did not conduct any audits of UDMR between 2009 and 2015, and in a 2009 report admitted that the current system of justification is “imprecise and inaccurate” and recommended the introduction of a uniform reporting methodology (Romanian Court of Auditors, 2016). This results in an opaque model of ethnic rent-seeking, with the Romanian state allocating generous funds to an organization that manages them with almost complete autonomy, without providing coherent explanations to the public. Although UDMR claims to be subject to controls, in reality, the institutional mechanisms allow for symbolic and formal justification, rather than effective control. This situation contravenes the principles of democratic accountability and fairness in the use of public funds, managing budgetary resources without oversight and in its own political interest.

Between 2000 and 2007, the Hungarian Democratic Union of Romania (UDMR) received public funding as a political party, in accordance with the legal framework established by Law No. 27/1996 on political parties, Law No. 43/2003 on the financing of political activities, and Government Emergency Ordinance No. 8/2007 on elections to the European Parliament. According to letter No. 15C/232/rp/20.11.2008 from the General Secretariat of the Government, the amounts allocated annually to UDMR from the state budget as a party are as follows:

### **1) Amounts allocated to UDMR as a political party (2000–2007)**

| <b>Year</b>         | <b>2000</b> | <b>2001</b> | <b>2002</b> | <b>2003</b> | <b>2004</b> | <b>2005</b> | <b>2006</b> | <b>2007</b> |
|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <b>Amount (lei)</b> | 389,784     | 616,938     | 746,944     | 746,944     | 746,944     | 729,480     | 729,481     | 729,481     |

(letter No. 15C/232/rp/20.11.2008-General Secretariat of the Government, 2008)

In parallel with these allocations as a political party, UDMR also benefited from substantial funds through the Communitas Foundation, an organization it controls, and which was designated as the instrument for distributing public funds to the Hungarian community (Cosmeanu and Balogh, 2005). **The Hungarian Cultural**

**Society of Transylvania (SMCT)** received the following budget allocations between 1997 and 2001: 1997 – 525,000,000 lei + 500,000,000 lei; 1998 – 1,140,000,000 lei; 1999 – 5,100,000,000 lei; 2000 – 9,500,000,000 lei (DRI address no. 925/23.05.2025)

Furthermore, according to DRI address no. 925/23.05.2025, the amounts collected by **the Communitas Foundation between 2001 and 2009** are shown in the following table. To understand the figures and to accurately report the amounts that fluctuated over the years due to rampant inflation and financial changes, we chose to report the sums in relation to the dollar value at the time, but also to report based on the inflation rate in new lei:

- 944,500,000 lei in 2001 (01.06 – 31.12);
- 1,861,279,000 lei in 2002;
- 3,730,000,000 lei in 2003;
- 50,000,000,000 lei in 2004 (election year);
- 58,520,000 lei in 2005;
- 8,020,000 lei in 2006;
- 10,770,000 lei in 2007;
- 14,250,000 lei in 2008;
- 2.110.000 lei in 2009 (01.01 – 28.02).

**2) Amounts received between 2001 and 2009, adjusted to inflation:**

| Year         | Amount ROL             | USD exchange rate at that time | USD value at that time | USD value in 2025 | Amount in RON     | Inflation (RON) | RON value in 2025 |
|--------------|------------------------|--------------------------------|------------------------|-------------------|-------------------|-----------------|-------------------|
| 1994         | <b>180,100,000</b>     | 1,670                          | 107,784                | 204,789           | 18,010            | x20.0           | 360,200           |
| 1995         | <b>252,140,000</b>     | 2,033                          | 124,002                | 235,604           | 25,214            | x17.5           | 441,245           |
| 1997         | <b>1,025,000,000</b>   | 7,150                          | 143,357                | 272,378           | 102,500           | x12.0           | 1,230,000         |
| 1998         | <b>1,140,000,000</b>   | 8,260                          | 138,014                | 262,227           | 114,000           | x10.0           | 1,140,000         |
| 1999         | <b>5,100,000,000</b>   | 15,300                         | 333,333                | 633,333           | 510,000           | x8.5            | 4,335,000         |
| 2000         | <b>9,500,000,000</b>   | 21,700                         | 437,327                | 831,921           | 950,000           | x7.5            | 7,125,000         |
| 2001         | <b>9,445,000,000</b>   | 29,000                         | 325,690                | 618,811           | 944,500           | x6.8            | 6,423,600         |
| 2002         | <b>18,612,790,000</b>  | 33,500                         | 555,434                | 1,055,324         | 1,861,279         | x5.8            | 10,795,418        |
| 2003         | <b>37,300,000,000</b>  | 33,200                         | 1,123,494              | 2,134,638         | 3,730,000         | x5.0            | 18,650,000        |
| 2004         | <b>50,000,000,000</b>  | 32,500                         | 1,538,462              | 2,923,078         | 5,000,000         | x4.2            | 21,000,000        |
| 2005         | <b>58,520,000,000</b>  | 29,800                         | 1,963,758              | 3,731,141         | 5,852,000         | x3.7            | 21,652,400        |
| <b>TOTAL</b> | <b>191,075,030,000</b> |                                | <b>6,790,655</b>       | <b>12,903,244</b> | <b>19,107,503</b> |                 | <b>93,152,863</b> |

(DRI address no. 925/23.05.2025)

In order to correctly understand the amounts received by UDMR and its subordinate entities between 1994 and 2005 we need to explain these figures because the value of the leu before the transition to *the new leu* in 2005 was volatile and can be difficult to understand without reporting the amounts. As a result, these entities received significant financial support from the state budget, which, although initially expressed in old lei, take on a completely different weight when updated to the real value of money today. Historical data on budget allocations were converted from ROL to RON using the official 2005 redenomination rate (10,000:1). Values were then adjusted to 2025 equivalents using cumulative inflation coefficients based on the Romanian Consumer Price Index (INS data), and, for comparative purposes, converted into U.S. dollars at the historical exchange rates published by BNR. USD values were further adjusted to 2025 purchasing power using CPI-based inflation multipliers. We are talking about **a total of over 191 billion old lei (ROL), equivalent to approximately 19.1 million new lei (RON), which means an amount of over 93 million RON in 2025 value if we consider the accumulated inflation and denomination that took place in Romania over the last three decades.** Alternatively, in international terms, this money was worth about \$6.79 million at the time it was granted, and adjusted to the current dollar value, it exceeds \$12.9 million.

This financial analysis highlights a paradox: while UDMR promotes autonomy and distancing from the Romanian state, its activities have been financed by the Romanian state itself. Whether we are talking about logistical support, headquarters, cultural projects, or other activities, these amounts have been allocated from the public budget, i.e., from the contributions of all citizens. In a context where “autonomy” is being demanded more and more vocally, the reality shows that, at least in the recent past, this autonomy has been generously budgeted by the center.

Since 2008, based on Law No. 334/2006, the financing of political parties has been taken over by the Permanent Electoral Authority. UDMR received 512,421 lei in 2008 and only 80,122 lei in 2009 under this mechanism, after which, from March 2009, it was no longer funded under party legislation. As a result, since 2009, UDMR has started to receive funds directly from the state budget as an NGO representing the Hungarian community. Thus, in that year, UDMR received 13,072,660 lei, to which was added 2,110,000 lei for the Communitas Foundation. Total public funding for that year exceeded 15 million lei.

During the first period of budget allocations from the government, UDMR received 180,100,000 old lei in 1994 and 252,140,000 old lei in 1995. Between 2009 and 2025, UDMR was funded directly as an NGO, without the intermediation of other foundations. The amounts received were as follows:

- |                                              |                           |
|----------------------------------------------|---------------------------|
| • 2,110,000 lei in 2009 (January - March);   | • 24,911,780 lei in 2017; |
| • 13,072,660 lei in 2009 (March - December); | • 26,157,480 lei in 2018; |
| • 15,182,660 lei in 2010;                    | • 29,436,580 lei in 2019; |
| • 15,987,000 lei in 2011;                    | • 32,311,890 lei in 2020; |
| • 17,178,000 lei in 2012;                    | • 36,821,810 lei in 2021; |
| • 18,011,900 lei in 2013;                    | • 45,695,860 lei in 2022; |
| • 18,558,820 lei in 2014;                    | • 51,394,610 lei in 2023; |
| • 22,201,080 lei in 2015;                    | • 58,487,170 lei in 2024; |
| • 22,877,630 lei in 2016;                    | • 64,335,890 lei in 2025  |
| <b>TOTAL: 536,042,820 LEI</b>                |                           |

This financial evolution reveals a significant increase: from the equivalent of 18,000 lei in 1994 (360,000 adjusted for inflation) to almost 64 million lei in 2025, which is equivalent to an increase of more than 177 times. This increase in funding has taken place against the backdrop of a continuous decline in the ethnic Hungarian population in Romania, from 1,6 million in 1991 to slightly less than 1 million in 2021. Moreover, during periods when the party is in charge of a ministry, the amounts allocated to projects within the Hungarian community increase exponentially. For example, in 2009–2011 alone, in parallel with its funding as an NGO, UDMR benefited from significant resources through the Ministry of Culture. Thus, during Kelemen Hunor's term of office, approximately 7,300,000 lei were allocated for the restoration of Hungarian monuments in the counties of Covasna and Harghita (Roncea, 2015). This alternation between party and NGO status allowed UDMR to consistently access significant public funds without being subject to the same standards of control and transparency. The allocations, which were disproportionate to demographic dynamics, can raise questions whether the funds were used strictly for community interests or also for internal political purposes.

As a result, the total funding received by UDMR, SMCT, and Communitas between 1994 and 2025, from the Romanian government, as direct allocations to organizations representing the Hungarian minority, amounts to the following:

- 1994-2005: 191,075,030,000 old lei, equivalent to **93,152,863** current lei;
  - 2006-2008: **33,040,000 lei**;
  - 2009-2025: **536,042,820 lei**;
- Reaching a TOTAL of 662,235,683 lei (approximately 133.24 million euros).**

This is a figure that could shock the Romanian taxpayers, especially given that many Romanian communities in isolated villages, in the diaspora, or even in Transylvania in Romanian communes in Covasna and Harghita do not receive anywhere near comparable financial support. To understand the magnitude of this amount: 120 million euros is enough to build the Leghin-Moțca section of the A8 motorway (Andrei, 2025) and even less is needed to build a new pediatric hospital (Apipie, 2022).

## 6. Impact and Conclusions

In areas where localities are politically dominated by UDMR (the counties of Covasna-Harghita) and even counties where they do not necessarily have a Hungarian majority (parts of Bihor, Mureș, Satu Mare, Sălaj counties), we are faced with a dilution of the Romanian's state presence and authority. The institutional networks controlled by UDMR, schools, local media, cultural NGOs, and local public administrations often operate in a closed circuit, promoting a distinct identity and their own agenda, aligned with Budapest's policy. This creates "*invisible internal borders*" that separate ethnic communities. The Romanian majority in these areas feels abandoned and discriminated against, complaining that the local authorities controlled by UDMR neglect the interests of Romanian citizens (Baltasiu, Săpunaru and Bulumac, 2013). For their part, Hungarians in the same areas are increasingly less likely to look to Bucharest as the center of power, believing that their problems



can be solved either locally through UDMR or directly through the support of Budapest. This split in national solidarity is perhaps the most dangerous effect of the policy of small steps: without formally breaking down borders, it manages to “move” the symbolic frontier, delimiting a “country within a country” (Bădescu, Dungaciu and Baltasiu, 1995).

The Romanian case illustrates a distinctive example of what Bíró and Pallai (2010) describe as a *political accommodationist paradigm*. Romania has established a stable system of general-purpose subsidies for national minority organizations, granting them consistent public funding and broad discretion over its use. Among European states, it remains one of the few to provide such sustained institutional and financial support to a national minority organization that simultaneously operates as a political actor. This paradox, where the state continuously finances, through public funds, an ethnopolitical structure that advances collective autonomy within a unitary constitutional framework highlights the contradictions inherent in Romania’s approach to minority governance. Resources intended for cultural preservation have become, in practice, the structural basis for a parallel system of political and institutional representation.

Despite Romania’s declared commitment to supporting historical communities, the actual budgetary practice reveals a striking imbalance. As we observed in this analysis, for decades, the Romanian state has allocated hundreds of millions of lei to sustain the autonomy-building structures of the Hungarian community in Transylvania, while the historical Romanian communities beyond the country’s borders have received only modest support through the Department for Romanians Abroad (DRP) for many years, having a budget between 3 and 5 million lei per year for projects abroad (DRP official data, 2021-2023), these values increasing only in recent years such as 2024 and 2025. In the past, these sums were less than the funding allocated in a single year to organizations affiliated with UDMR inside Romania, which exceeded 64 million lei in 2025 alone. Such a discrepancy highlights a profound inequity: while Romania finances, from its own public budget, an internal autonomy project, it underfunds the preservation of Romanian identity across its historical borders.

In comparison with other historical minorities in Europe, the asymmetry is striking. The South Tyroleans in Italy (Peterlini, 2013), or the Catalans in Spain (Maite, 2018) operate within transparent and constitutionally regulated frameworks of autonomy, with clearly defined limits of competence and control. None of these cases involves a minority that receives unconditional public funding to maintain institutions that function as parallel administrations. Romania thus appears as a unique anomaly in which state resources are transformed into instruments for building a separate political identity.

Based on the data analyzed here, there is place to argue about the existence of an unofficial *de facto* autonomy: UDMR has created a framework in which important decisions for the Hungarian community in education, culture, and local economic development are taken either at the level of local/county councils dominated by UDMR, or in Budapest, in consultation with UDMR, and only then communicated to Bucharest.

In conclusion, this reality requires an intelligent, firm but nuanced response from the authorities in Bucharest in order to reaffirm constitutional principles without fueling inter-ethnic conflicts. The stake is to maintain Romania as a unitary and sovereign state in practice, not just in name, which is a stake that concerns both the Romanian majority and the ethnic Hungarian citizens, whose prosperity and rights can only be fully guaranteed in a state that does not cede its fundamental attributes.

Despite the fact that UDMR, with leaders in Harghita and Covasna counties, has benefited for over three decades from a constant flow of financial resources from both the Romanian and Hungarian governments, the social and economic reality of these counties remains one marked by profound disparities with the rest of the country. In 2023, the GDP per capita in Harghita was approximately €12,230, below the national average (CNP, 2024), and in Covasna the situation was similar, with values consistently below the regional average of €12,297 (Ecoteca, 2025) compared to the national average of €13,916. This discrepancy is directly reflected in the standard of living: in November 2024, the average net salary in Harghita was 3,995 lei, the lowest in the country (Informatia Harghitei, 2024), while in Covasna it was around 4,125 lei, also below the national average of 4,479 lei (Luca, 2024).

On a social level, the indicators confirm the same reality of marginalization. The unemployment rate in Covasna reached 5.09% in December 2023, significantly higher than the national average (Ziar Harghita, 2025), and in Harghita, access to jobs remains limited, with long-term unemployment in rural areas (Ziar Harghita, 2021). Nationally, the risk of poverty or social exclusion was 27.9% in 2024 (INS 2025) but sociological analyses indicate an even higher level of vulnerability in Harghita and Covasna (Lupu, 2018). This paradoxical picture shows that, although millions of euros have been directed in recent decades to projects politically managed by UDMR and additionally supported by Hungarian funds, the local population has not benefited from real development, but has remained trapped in a cycle of underdevelopment, poverty, and dependence.

Furthermore, an analysis of budget allocations to UDMR and the foundations it controls reveals a financial mechanism of remarkable scale and surprising continuity, regardless of the political context or demographic dynamics of the Hungarian community. From modest sums received as a political party in the 2000s, UDMR has come to directly manage over 20 million lei annually as an NGO within a decade, and in recent years to exceed 60 million lei annually. Cumulatively, between 1994 and 2025, Hungarian organizations have benefited from over 600 million lei in public funds allocated directly by the Romanian government. This development raises legitimate questions about the sustainability, proportionality, and, above all, transparency of these allocations, given that public justifications are sketchy, access to information is blocked, and real control over the destination of the funds is practically non-existent. In a democratic state, the management of such large public funds should be accompanied by clear reporting and auditing obligations, not just formal entrustment to a political entity with an ambiguous status between party, NGO, and cultural intermediary.

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## Self-Esteem As A Determinant Of Job Satisfaction

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### **Abstract:**

This research paper investigates the relationship between self-esteem and job satisfaction, exploring how individual levels of self-esteem influence employees' perceptions of their job satisfaction, using a sample of 60 individuals aged between 35 and 59 years working in the field of asphalt mixtures. The main goal is to identify how self-esteem acts as a determinant of the level of job satisfaction as well as to identify gender differences in terms of job satisfaction. The research method involves the use of Rosenberg's self-esteem scale and Spector's Job Satisfaction Evaluation questionnaire. Statistical analysis revealed that self-esteem is an important determinant of employee satisfaction, as well as the absence of gender differences in job satisfaction. The findings suggest that self-esteem is a significant predictor of job satisfaction, that both men and women can experience job satisfaction equally, and that interventions to improve the work climate should be addressed to all employees, regardless of gender. These findings can serve as important directions for future research in organizational and managerial psychology.

**Keywords:** *Job Satisfaction, Self-Esteem, Organisation, Gender Differences*

### **1. Theoretical aspects**

#### **1.1. Conceptualization**

Baumeister (1993) defines self-esteem as "the subjective evaluation of one's own worth and competence, reflecting confidence and respect for oneself." This can be influenced by a variety of factors, including childhood experiences, social feedback, and success in achieving personal and professional goals (Rosenberg, 1965: 1297–1349). On the other hand, job satisfaction is defined as the degree to which employees perceive their psychological and social needs to be met within the organization (Locke, 1969: 309-336). This concept encompasses aspects such as

professional recognition, positive interpersonal relationships, decision autonomy, and a sense of personal accomplishment (Spector, 1997: 92-99).

Self-esteem and job satisfaction are interdependent and complex. Individuals with high self-esteem tend to have a positive self-attitude and feel more confident in their ability to handle professional challenges (Judge and Bono, 2001). This can lead to a more positive perception of the work environment and an increase in job satisfaction (Brown and Marshall, 2006).

On the other hand, individuals with low self-esteem may experience difficulties in feeling valuable and competent within the organization, which can negatively affect their perception of job satisfaction (Judge and Bono, 2001).

Moreover, the degree of satisfaction regarding the job performed can significantly impact an individual's level of self-esteem. According to Lin (2017: 54-67), recognition of efforts and personal achievements within organizations can bolster self-respect and confidence in one's abilities. In contrast, negative experiences and disappointments in the workplace can undermine self-esteem and lead to a decrease in job satisfaction, having detrimental effects on mental health and professional performance (Deci and Ryan, 2008).

Judge and his colleagues (2017) argue that understanding the relationship between self-esteem and job satisfaction is crucial for the development and effective management of human resources in organizations. Promoting healthy self-esteem and job satisfaction contributes to increased employee engagement, performance, and well-being, having a positive impact on long-term organizational success (Judge et al., 2017).

The specialized literature highlights that respect for human rights within the family and school environments represents one of the fundamental bases for the formation of personal and social identity, directly influencing the development of self-esteem and the sense of personal value. Early socialization in contexts characterized by respect, equality, emotional support, and recognition of individual dignity contributes to the consolidation of positive self-perceptions, which are later reflected in how individuals relate to the professional environment and their level of job satisfaction. When fundamental rights are internalized through everyday experiences - both within the family and educational institutions - individuals develop a sense of autonomy, competence, and belonging, elements frequently associated with higher levels of self-esteem and more favorable evaluations of social and professional environments (Otovescu, 2013). Thus, the analysis of the relationship between self-esteem and job satisfaction can be enriched by integrating a human rights perspective, which emphasizes the role of socialization contexts in shaping psychosocial resources that subsequently influence organizational adaptation and individual well-being (Otovescu, 2013).

Understanding self-esteem solely as an individual psychological trait risks overlooking the broader social and cultural contexts in which self-perception is constructed and negotiated. Sociological research highlights that identity formation is shaped through processes of socialization, belonging, and interaction with institutional environments that provide symbolic frameworks for self-evaluation and personal meaning. Studies on identity reconstruction within ethnic communities demonstrate that individuals develop perceptions of competence, autonomy, and personal value through continuous engagement with collective narratives and social



structures (Otovescu, Păsătoiu & Cioacă, 2020). From this perspective, self-esteem can be interpreted not only as an internal psychological resource but also as a socially mediated construct that influences how individuals interpret professional roles, organizational expectations, and ultimately their level of job satisfaction.

### **1.2. Self-Esteem**

Self-esteem, defined as "the subjective evaluation of one's own worth and competence, plays a crucial role in individual functioning and well-being" (Orth and Robins, 2014). This psychological construct influences attitudes, behaviors, and performance in various domains, including interpersonal relationships, professional success, and mental health. Recent research has paid special attention to the role of self-esteem in interpersonal relationships. According to Crocker and Park (2004), individuals with high self-esteem have more satisfying and healthier relationships, characterized by trust, effective communication, and emotional support, while those with low self-esteem may struggle with positive interpersonal relationships. Those with high self-esteem often make statements like "I am a person of value, equal to others" and "I am satisfied with myself" (Rosenberg, 1965, cited in Pierce and Gardner, 2004).

Most of our understanding of self-esteem in general, and self-esteem in the context of work and organizations, comes from research focused on global self-esteem (Brockner, 1988: 239–261). Organization-based self-esteem is seen to be predicted by organizational structure sources, signals from the organization regarding one's value, and the circumstances of one's workplace success. Additionally, in the organizational environment, self-esteem is associated with other significant attitudes and behaviors, such as job satisfaction, organizational commitment, motivation, citizenship behavior, role performance, and organizational turnover intentions (Nikita, Sharad, Ajay, Singh and Nandal, 2023).

Self-esteem plays a significant role in the organizational environment, influencing how employees perceive and carry out their activities within the organization. It is defined as the subjective evaluation of one's own worth and competence, reflecting confidence and respect for oneself (Judge and Bono, 2001). Within organizations, self-esteem can influence attitudes towards work, level of engagement, and individual performance.

Experiences within the organization, such as managerial feedback and interactions with colleagues, can influence employees' self-esteem (Judge, Bono, 2001). Additionally, professional recognition and success in achieving professional goals can bolster employees' self-esteem in the organizational environment (Lin, 2017: 54-67).

### **1.3. Job Satisfaction**

According to Broeck and his colleagues (2010), "job satisfaction represents the individual's subjective evaluation of job experiences, including aspects such as relationships with colleagues, work environment, recognition of efforts, and achievement of professional goals. Job satisfaction is crucial as an indicator of psychological well-being and can influence commitment, productivity, and retention in the organization." Locke (1976: 1297–1349), one of the foremost scholars of this construct, views job satisfaction as "the pleasant emotional state resulting from an

employee's appraisal of his or her job and the realization that this appraisal allows the fulfillment of important values." The concept is multidimensional, involving both overall evaluation and appreciation of various job-related factors (Carloto and Câmara, 2008). As emphasized by Tamayo (2000: 37–47), these factors include salary and benefits, colleagues, supervision, working conditions, job nature, career advancement, job stability, personal development, and workload.

According to Hoppock (1935), job satisfaction refers to the feeling of physical, psychological, and social satisfaction associated with professional activity. This satisfaction is essential for job performance, health status, and career decisions. It can be divided into two main categories: intrinsic satisfaction, which refers to individual pleasure derived from the completed work, and extrinsic satisfaction, which involves the benefits and conditions of the work environment (Kalleberg, 1977; Porter et al., 1974).

Literature on job satisfaction indicates many antecedents that include job characteristics such as task autonomy, task significance, skill variety, participation, influence over standards, required innovation, job involvement, value congruence, and pay (Fecerer et al., 1982). Generally, higher job satisfaction seems to be associated with more significant, challenging, and varied tasks, with greater participation and involvement, common values, and higher salaries.

## **2. Research Methodology**

### **2.1. Objectives of the Study**

- The aim of this research is to investigate the relationship between self-esteem and job satisfaction, exploring the influence of self-esteem on employees' level of job satisfaction.
- This study intends to analyze whether there are differences between men and women regarding their job satisfaction.

### **2.2. Hypotheses**

- It is hypothesized that self-esteem is a significant predictor of employees' level of job satisfaction.
- It is hypothesized that there are significant differences between men and women in terms of their level of job satisfaction.

### **2.3. Presentation of the Sample**

The research group consists of 60 subjects, employees of an organization in Bucharest specializing in road paving. The gender distribution is symmetrical: 30 women and 30 men, aged between 35 and 59 years old.

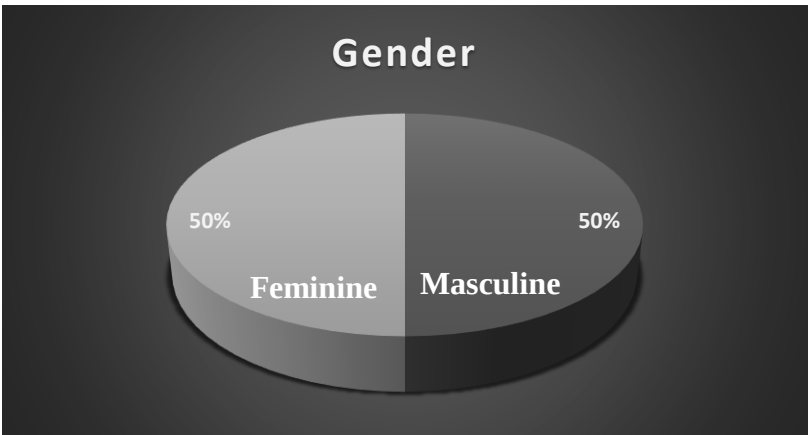


**Figure 1.** Diagram of Employee Distribution by Gender

**2.4. Tools Used**

To achieve the objectives and test the hypothesis, we used the following instruments:

- ✚ Rosenberg Self-Esteem Scale (1965)

The scale was developed by Morris Rosenberg in 1965 and is still in use today. It measures the overall feeling of personal worth and self-acceptance with 10 items, each rated from strongly disagree (1 point) to strongly agree (4 points). Some items are reverse-scored. The final score ranges from 10 to 40, indicating low or high self-esteem.

- ✚ Job Satisfaction Survey (Spector, 1994)

The questionnaire was adapted into Romanian by Horia Pitariu and consists of 36 items. Scoring is done on a 6-point Likert scale, where: 1 represents strongly disagree, 2 moderately disagree, 3 slightly disagree, 4 slightly agree, 5 moderately agree, and 6 strongly agree. This instrument measures satisfaction in various aspects of work, such as salary, promotion, supervision, fringe benefits, contingent rewards, work conditions, coworkers, job nature, and communication within the organization.

**2.5. Data Analysis**

**Hypothesis 1:**

**Table 1.** Regresdion Model

| Model                                    | R                 | R Square | Adjusted R Square | Std. Error of the Estimate |
|------------------------------------------|-------------------|----------|-------------------|----------------------------|
| 1                                        | .866 <sup>a</sup> | .750     | .746              | 22,935                     |
| a. Predictors: (Constant), stima.de.sine |                   |          |                   |                            |

From Table 1, the correlation coefficient  $R = .866a$  indicates a significant correlation between the variables of the model, in our case between self-esteem and job satisfaction. Additionally, the value of  $R\text{ Square} = .750$  suggests that

approximately 75% of the variation in the dependent variable is explained by the independent variables included in the model.

**Table 2.** ANOVA (Variance Analysis)

| ANOVA <sup>a</sup>                          |                |    |             |         |                   |
|---------------------------------------------|----------------|----|-------------|---------|-------------------|
| Model                                       | Sum of Squares | df | Mean Square | F       | Sig.              |
| Regression                                  | 91737,603      | 1  | 91737,603   | 174,396 | ,000 <sup>b</sup> |
| 1 Residual                                  | 30509,730      | 58 | 526,030     |         |                   |
| Total                                       | 122247,333     | 59 |             |         |                   |
| a. Dependent Variable: satisfactia.in.munca |                |    |             |         |                   |
| b. Predictors: (Constant), stima.de.sine    |                |    |             |         |                   |

Both the F value = 174.396 and the Sig. value = .000 indicate a significant difference between the variables. Thus, the ANOVA analysis confirms that the regression model is significant, meaning that the independent variable (self-esteem) is a significant predictor of the dependent variable (job satisfaction).

**Tabele 3.** The coefficients of the regression estimation

| Coefficients <sup>a</sup>                   |                             |            |                           |             |
|---------------------------------------------|-----------------------------|------------|---------------------------|-------------|
| Model                                       | Unstandardized Coefficients |            | Standardized Coefficients | t Sig.      |
|                                             | B                           | Std. Error | Beta                      |             |
| 1 (Constant)                                | 31,056                      | 9,745      |                           | 3,187 ,002  |
| 1 stima.de.sine                             | 4,087                       | ,309       | ,866                      | 13,206 ,000 |
| a. Dependent Variable: satisfactia.in.munca |                             |            |                           |             |

The unstandardized coefficient (B) is 4.087, indicating that for each unit increase in the predictor "self-esteem", the dependent variable (job satisfaction) increases by approximately 4.087 units. The Sig. value = .000 suggests a highly significant importance of the "self-esteem" coefficient. These results suggest that "self-esteem" as a predictor is significantly associated with the level of job satisfaction, and there is a strong positive relationship between these two variables, confirming our hypothesis.

Job satisfaction can bolster self-esteem, and increased self-esteem can enhance job satisfaction. This link is influenced by both individual and organizational factors. Encouraging personal development and fostering a positive work environment are essential for improving employees' self-esteem and job satisfaction.

According to Smith and Brown (2020: 239–261), high self-esteem is linked to increased job satisfaction, influencing how employees handle challenges and rewards. Similarly, White's research (2019) indicates that positive workplace

experiences, such as professional recognition and colleague support, can bolster employees' self-esteem, contributing to their job satisfaction.

Organizational psychology studies have highlighted that an individual's self-esteem can influence not only how they perceive and react to the work environment but also how they interact with colleagues, managers, and job tasks (Roberts and Jackson, 2020). People with high self-esteem may have a more proactive and engaged approach to job tasks, leading to better performance and greater job satisfaction (Judge and Bono, 2019). Additionally, they may be more resilient to work-related stress and better equipped to handle negative feedback or constructive criticism from colleagues and managers (Harter, Schmidt and Keyes, 2018).

People with high self-esteem are more likely to set challenging yet achievable goals for themselves. They have confidence in their ability to reach these goals, leading to a sense of accomplishment and satisfaction when achieved. This cycle of goal-setting and achievement contributes to overall job satisfaction (Judge and Bono, 2001). They often also have better interpersonal skills and are more adept at forming positive relationships with colleagues and supervisors. They are confident in their interactions and better able to communicate effectively, resolve conflicts, and collaborate with others, leading to a more pleasant and supportive work environment (Robbins and Judge, 2019).

Individuals with high self-esteem tend to experience fewer negative emotions and more positive emotions at work, contributing to overall greater satisfaction. They are also more motivated to pursue career advancement and development opportunities, being confident in their abilities and open to new challenges and responsibilities (Luthans, Youssef and Avolio, 2007).

Low self-esteem among employees can lead to lower job satisfaction, increased absenteeism, and poor performance, according to Orth et al. (2015). Additionally, Twenge et al.'s research (2004) suggests that individuals with low self-esteem are more vulnerable to negative experiences such as aggression, discrimination, and interpersonal conflicts at work, which can intensify psychological stress and affect organizational cohesion.

However, the impact of self-esteem on job satisfaction can be moderated by factors such as organizational culture, job characteristics, and individual differences (Harter et al., 2002). Organizations can significantly benefit from promoting a culture that cultivates and supports employees' self-esteem. This can be achieved through various organizational interventions and leadership practices.

According to Avolio and Gardner (2005), authentic leaders can improve employees' self-esteem and motivation through empathy and transparency. Positive workplace experiences, such as recognition and advancement opportunities, reinforce feelings of self-worth, according to Lyubomirsky, King and Diener's study (2021). Additionally, according to Spreitzer and Porath's research (2019), collaboration and support in personal development at work can increase employees' self-esteem and satisfaction.

The relationship between self-esteem and job satisfaction is complex and interconnected, and understanding this relationship can be essential for human resource management and promoting a healthy and productive work environment. Thus, based on the literature and the results obtained in this research using the IBM SPSS program, our hypothesis is confirmed.

**Hypothesis 2:****Table 4.** Data Normality Test

| Tests of Normality   |          |                                 |    |              |                  |
|----------------------|----------|---------------------------------|----|--------------|------------------|
|                      | sex      | Kolmogorov-Smirnov <sup>a</sup> |    | Shapiro-Wilk |                  |
|                      |          | Statistic                       | df | Sig.         | Statisticdf Sig. |
| satisfactia.in.munca | feminin  | ,226                            | 30 | ,000         | ,843 30,000      |
|                      | masculin | ,185                            | 30 | ,010         | ,917 30,022      |

The significance threshold resulting from applying the Kolmogorov-Smirnov test, which indicates the normality of the distribution for both women and men, is equal to .000 and .010 respectively. Since the significance threshold  $p < .050$ , it means that the distribution is non-normal or Non-Gaussian. Therefore, we will apply a non-parametric testing method.

**Table 5.** U Mann-Withney Test Results

| Test Statistics           |                      |
|---------------------------|----------------------|
|                           | satisfactia.in.munca |
| Mann-Whitney U            | 379,500              |
| Wilcoxon W                | 844,500              |
| Z                         | -1,042               |
| Asymp. Sig. (2-tailed),   | .297                 |
| a. Grouping Variable: sex |                      |

The values obtained for the Mann-Whitney U statistics suggest that there is no significant difference in job satisfaction levels between men and women, as the p-value associated with .297 is greater than 0.05. Therefore, our hypothesis is not confirmed.

However, various studies found in the specialized literature have identified differences between the two genders regarding job satisfaction.

According to research by Garcia and Perea (2017), gender differences in terms of pay and career advancement opportunities can significantly influence job satisfaction levels. Women tend to be paid less than men for the same work and have fewer chances to advance to leadership positions. These disparities can contribute to lower job satisfaction levels for women compared to men. Studies by Wang et al. (2018) show that women may sometimes have a lower perception of their value in the organization or may be more susceptible to gender discrimination and stereotypes. These perceptions and experiences can affect their job satisfaction levels and sense of belonging to the organization.

According to Williams and Dempsey (2019), women are often responsible for more caregiving tasks within the family, which can lead to difficulties in maintaining a work-life balance. This can negatively affect their job satisfaction compared to men.

Studies have suggested that various job expectations, values, and many other factors can contribute to differences in job satisfaction between men and women. Society often has double standards for women, with most people believing in

traditional gender roles (Miao, Li and Bian, 2017). On one hand, women are expected to perform well in their careers; on the other hand, they are also expected to be good wives and mothers and to take on most household responsibilities. Therefore, career women often face more work-family conflicts, which can lead to lower job satisfaction compared to men (Liu et al., 2021).

One explanation for the differences in satisfaction between women and men is that men place more emphasis than women on extrinsic job benefits, such as pay (Konrad et al., 2000; Sloane and Williams, 2000). Promotion, another extrinsic variable, impacts job satisfaction and also varies by gender, possibly because men are promoted to higher-level jobs earlier and more easily than women (Ng and Feldman, 2010).

According to a study by Andrade, Westover, and Peterson (2019), the paradox that women are more satisfied with their jobs than men, despite earning less, should no longer exist in contemporary society. The fact that women and men are similar in their job satisfaction levels shows that gender differences are becoming less relevant. A significant finding in this study was that men and women seem equally affected by extrinsic rewards. Again, this could be explained by the fact that men's and women's roles are less differentiated than in the past. In recent decades, there has been an assumption that the man was the family's breadwinner, and the woman had a job to supplement the family income. In this scenario, women might not be as concerned if their job provided stability, growth opportunities, or even if a job was stressful, as they could always simply leave if things were negative. However, work today is seen as a shared responsibility, and it makes sense that if men and women have a similar view of their roles as income producers, satisfaction would be driven by the same forces.

### **Conclusions**

The research confirms that there is a significant and positive relationship between employees' self-esteem and their job satisfaction. Self-esteem is an important predictor of job satisfaction and influences the level of professional satisfaction. Employees with higher self-esteem are more fulfilled and satisfied at work, being also more motivated, involved, and loyal to the organization. Promoting a work environment that encourages the development of self-esteem can improve employee satisfaction and organizational performance, bringing benefits such as increased morale, reduced absenteeism, and improved overall results. Investing in programs and practices that support employees' self-esteem can have a significant impact on the organization.

Studying the long-term effects of self-esteem levels on job satisfaction and organizational outcomes could provide valuable insights for managers and leaders in terms of human resource management strategies and long-term performance growth.

The second hypothesis is not confirmed; thus, according to the results obtained, there are no significant differences between genders in terms of job satisfaction. Although our research findings do not confirm gender differences, being valid only for the sample studied in this work, other studies have confirmed the existence of gender differences. It is important to acknowledge that other studies have confirmed the existence of differences between women and men regarding job satisfaction, these differences being influenced by a variety of factors, including pay,

career advancement opportunities, perception of role and value in the organization, work-life balance, and organizational culture.

By addressing these aspects, the research can make significant contributions to understanding and promoting a healthy and satisfying work environment that supports the personal and professional development of employees and maximizes organizational performance.

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## **The Legal Status Of Slavery In The Romanian Lands During 15th–19th Centuries**

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### **Abstract:**

This study examines the legal and social status of slavery in the Romanian principalities from the fourteenth to the nineteenth century within the broader Byzantine and Balkan legal traditions. Drawing on the Syntagma of Matthew Blastares, the Moldavian and Wallachian legal codes, and later codifications such as the Ipsilanti Code (1780), Caragea Code (1818), and Calimah Code (1817), it argues that slaves were conceived simultaneously as property and as persons protected by law. While the owner held extensive rights of use and transfer, the killing or sexual assault of a slave was treated as a capital crime. Legal sources also attest to limited patrimonial capacity, marriage rights, and possibilities of manumission through service, religious vows, or marriage to a free person. Comparative evidence from Byzantine, Serbian, and Bulgarian law highlights regional continuities and variations. By tracing the gradual legal transformation culminating in the abolition of slavery between 1843 and 1856, the study reveals the influence of inherited Byzantine norms.

**Keywords:** *slavery; Moldavia; Wallachia; legislation; Byzantine Empire*

Slavery is attested in Romanian documents dating back to the end of the 14th century, with the process of freeing slaves beginning in 1843 and ending in 1856. Initially, medieval Romanian documents refer to slaves alongside Roma, Tatars, and Bulgarians, but from the 17th century onwards, slaves in the Romanian lands of Wallachia and Moldavia were exclusively Roma, leading to an overlap between the ethnic term and the legal and social category.

The origin of slavery in the Romanian lands can be found in 14th-century Byzantine law, with Roma arriving north of the Danube during this period. South of the Danube, there are indications that at least some of the Roma were in a state of legal dependence on monasteries or private owners, being mentioned as being owned by monasteries on Mount Athos, in Serbia, and Bulgaria (Rochow: 1991). The preserved historical sources do not allow us to establish with certainty whether, upon their arrival in the Romanian lands north of the Danube, the Gypsies were free people who were later turned into slaves, or whether they were transferred with the status of dependency attested in the Byzantine space. In the following centuries, the custom was established in the Romanian lands, later codified in legal form, that Gypsies without masters existing on the territories of Wallachia and Moldavia were to be considered slaves of the sovereign.

Currently, the discussion regarding the slavery regime in the Romanian lands tends to consider the entire period of this legal and social regime as a unified whole, despite the long period of time between its first attestation at the end of the 14th century and its abolition in the mid-19th century, a historical period naturally subject to numerous changes. The current approach to issues related to slavery in the

Romanian lands tends to focus on issues related to the dehumanization of slaves. In this regard, issues such as the master's alleged right of life and death over his slaves, the legalization of the master's right to rape female slaves, the masters' right to separate slave families, and slaves' lack of ownership rights over their own property are highlighted (Petcut: 2015 and Negoï: 2025). In order to elucidate the legal regime of slaves, we analyzed the legal provisions relating to slavery in old Romanian legislation, starting with the codes of laws from the Middle Ages and up to the legal provisions from the beginning of the 19th century. The old Romanian legal system was inspired by Byzantine law, using Byzantine legal sources until the mid-19th century, translated into Romanian in the mid-17th century and gradually adapted to local customs and practices (Peretz: 1915). There was some controversy surrounding the application of the old Romanian law codes, as there was a belief that they were not commonly used in judicial practice. However, an analysis of the documents issued by the sovereigns of Wallachia and Moldavia shows very clearly that Byzantine-inspired law codes were used in trials and that sentences were handed down on the basis of them (Cronț: 1960). There is also confirmation of the use and observance of Byzantine law codes in cases involving slaves (Constantin: 2009).

The gradual overlap between ethnic identity and legal status illustrates how institutional frameworks can transform social categories into collective identities. Sociological studies have shown that identity formation is frequently shaped by political and legal classifications that structure group belonging and social positioning (Otovescu & Cioacă, 2023).

### **1. Slavery in the Byzantine commonwealth**

Slavery was a legal, economic, and social institution that persisted throughout the existence of the Byzantine Empire, inherited from the Roman world but continuously transformed over the course of nearly a millennium. Numerous legal codifications addressed slavery, including the Theodosian Code, the Justinianic Code, the Ecloga, the Novels of Leo, and the Syntagma of Matthew Blastares. While Byzantine slavery retained Roman foundations, significant reforms distinguished it from its predecessor: masters were forbidden to kill or sexually abuse their slaves, and the possibilities for manumission were expanded. Freedom could be obtained through marriage to the master, military service, or entrance into the clergy (Lensky: 2021).

In the late Byzantine period, slavery was regulated primarily through the Syntagma Canonum, a canon law compilation completed in 1335 by the monk Matthew Blastares of Thessalonica and through the Hexabiblos, compiled around 1344 by Judge Constantine Harmenopoulos. The Hexabiblos defined a slave as a person deprived of autonomy, entirely subject to the master's will; in this sense, slavery was equated with a form of civil death. Although masters retained discretion over punishment, they were explicitly prohibited from imposing capital penalties. Manumission could occur through testamentary disposition, clerical ordination with the master's consent, abandonment by the master during illness, military service, or marriage to a free person with the master's approval (Kopstein: 1966). Warfare constituted the principal source of slaves, with Byzantine chronicles documenting the frequent sale of war captives throughout the empire. Secondary sources included the hereditary transmission of slave status. In the final centuries of the empire, as its

military power waned, Constantinople assumed an intermediary role in the slave trade—linking the Black Sea, as a supplier of captives, with the Mediterranean, the primary market—through the activities of Venetian and Genoese merchants (Lensky: 2021).

Slavery existed in Bulgaria from the emergence of the state and was closely tied to warfare. Prisoners of war were enslaved, continuing practices already established among the Slavic populations south of the Danube prior to the arrival of the Bulgarian tribes (Hristov: 2015). The presence of slavery in ninth-century Bulgaria is confirmed by the "Responsa Nicolai ad consulta bulgarorum" (866), in which Pope Nicholas I addressed Tsar Boris on matters of faith. The Pope acknowledged that, although Christianity condemned the cruelty of slavery as incompatible with divine charity, the Church lacked authority to abolish it. Instead, the institution was treated as a vestige of the pre-Christian order that persisted into the new faith (Markova: 2020). The legal framework of medieval Bulgaria operated within the Byzantine Commonwealth, largely reproducing imperial legislation in Slavic translation. The "Law for Judging People" (860–880) is derived almost entirely from the "Ecloga" of Emperor Leo III (726), itself a revision of Justinianic law. This code prohibited sexual relations with enslaved women, established the manumission of war captives after repayment or labor equivalent to ransom, required masters to compensate for damages caused by their slaves, and forbade the enslavement of free persons (Petkov: 2008). Although written sources from medieval Bulgaria are scarce, documentary evidence confirms the existence of a slave trade. A 1350 record from Nessebar notes the sale of a Tatar slave named Moalba by Jacob of Nessebar to Giacomo Vasalo of Crete, illustrating Bulgaria's integration into the Venetian and Genoese slave networks operating between the Black Sea and the Mediterranean. Similarly, a 1378 charter of Tsar John Shishman granted to the Monastery of St. John of Rila mentions "Agupov kleti" ("Egyptians' huts"), indicating monastic ownership of Roma slaves.

In Serbia, slavery was an entrenched social and legal category, codified in the Nomocanon of St. Sava (1219), the earliest Serbian law code (Bozovic: 2018). Drawing extensively upon Byzantine legal tradition, St. Sava's code acknowledged slavery as contrary to natural law, which endowed all humans with freedom, but justified it as a product of warfare—the dominion of victors over the vanquished. The code prohibited masters from killing their slaves, permitting only corporal punishment. Enslaved individuals could enter the priesthood or monastic life only with their master's consent, upon which they were emancipated. Manumission performed before two witnesses conferred permanent freedom, while children of unions between free mothers and enslaved fathers inherited free status.

In 1349, three years after his coronation, Stefan Dušan promulgated a legal code that extended across his realm. The "Code of Dušan" drew heavily from the "Syntagma" of Matthew Blastares, abridging its canonical sections while retaining the secular ones (Angelini: 2012). Its provisions affirmed that slaves could be inherited but not transferred as marriage portions, that manumission was solely the master's prerogative, and that slaves shared fiscal obligations with dependent peasants. Slaves lacked independent legal standing, with their masters representing them in all judicial matters except in cases of murder, theft, or brigandage, which were adjudicated by state judges. Scholarly debate persists regarding the precise meaning

of the Serbian term "otrok," used in fourteenth-century documents to designate slaves. While some historians argue that "otroci" were merely dependent peasants, others interpret the term as denoting true slaves, given that they could be sold or inherited and lacked legal agency. Surviving royal charters, including Dušan's grant to the Monastery of Prizren, also record monastic ownership of Roma slaves. In Dalmatia, adjacent to the Serbian lands, slavery remained a legal, social, and economic reality from the ninth to the fifteenth century. Both ecclesiastical and lay owners possessed slaves, who could be sold, inherited, or employed to settle debts. Dalmatian law diverged from Byzantine precedent by classifying the offspring of free fathers and enslaved mothers as slaves (Budak: 2000). Slaves were denied legal representation and property rights, underscoring their complete subordination within the social hierarchy.

Throughout the late Byzantine world, encompassing the Byzantine Empire, Bulgaria, Serbia, and Dalmatia, legal frameworks concerning slavery exhibited remarkable continuity. This uniformity reflects their common derivation from Byzantine imperial legislation. While local adaptations existed, they did not constitute major divergences. In all regions, slavery was mitigated by moral, and legal constraints: manumission was facilitated through various avenues, masters were forbidden from inflicting lethal punishment, and the recognition of slave marriage provided limited social integration. The evolution of slavery in the Byzantine sphere thus illustrates both the endurance of ancient legal concepts and the gradual humanization of servile institutions under Christian moral influence.

## **2. Slavery in the Romanian lands**

The oldest code of laws used in the Romanian lands was Matei Blastares' Syntagma, a systematization of Byzantine legislation compiled in 1335 in Thessaloniki. This legal collection was widely used in Orthodox countries in the 14th and 15th centuries in Slavonic translation, forming the basis of Serbian legislation promulgated by Tsar Stefan Dušan in 1349. The spread of Matei Blastares' Syntagma is attested by the large number of manuscript copies preserved to this day: 24 from south of the Danube, and 15 copies from the 15th-17th centuries have been preserved in Romania, the oldest being from 1451, made by Dragomir in Târgoviște. (Alexandrov: 2012, 187-199)

Syntagma contains a definition of slavery originating in Roman law: "The main distinction in the law of persons is that all men are either free or slaves. Freedom is one's natural power of doing what one pleases, save insofar as it is ruled out either by coercion or by law. Slavery is the institution of the law of the peoples and consequence of war contrary to natural law, because nature has created all men free. The free are either freeborn or freemade. The freeborn were born of free parents and were not grown under the slave yoke; the freemade was born of a manumitted slave." (Šarkić: 2023, 83) Other provisions relating to slavery in Matei Blastares' Syntagma refer to the ways in which slaves could be freed: if they participated in war, entered the clergy, or married an Iberian person with the consent of their master, if they reported the murder of their master, or reported the kidnapping of a girl. The master could free his slave of his own free will before the sovereign, in church, before five witnesses or three witnesses if they signed a written document recording the release. Freed slaves were obliged to support their former master. A slave who

participated in the abduction of a woman was to be burned. Slaves could not testify in court and could not be appointed as guardians in their master's will. (Köpstein: 1966)

Romanian law was reformed in the mid-17th century through the translation into Romanian and systematization of Byzantine legislation carried out in Moldavia by Vasile Lupu in 1646, printed under the title "Carte românească de învățătură" (Romanian Book of Learning), and in Wallachia by Matei Basarab in 1652 under the name "Îndreptarea legii" (The Correction of the Law). With regard to the provisions relating to slavery, the two legal codes are almost identical, with the text from Wallachia taking over that from Moldavia. In these two codes, there is no definition of slavery as in Matei Blastares' Syntagma, and the provisions relating to slavery are not included in a specific chapter (Constantin: 2009). According to these codes of law, masters could inflict corporal punishment on slaves, but were liable to punishment for manslaughter if the slave was killed.

Slaves could not marry without the approval of their masters, and there was a legal recommendation, which was not binding, however, that slave families should not be separated, even if the marriage was between slaves belonging to two different masters, without their consent. Slaves could not testify in court. Emancipation from slavery could be granted with only two witnesses, and a slave woman who was forced into prostitution by her master was freed from slavery. Slaves guilty of theft were usually forgiven, but repetition of the offense or theft of large amounts of money was punishable. It was forbidden to kill slaves, and slaves guilty of murder were punished with death. However, slaves sentenced to death were usually ransomed by their master or by someone else who wanted to take them as slaves. The rape of a slave woman was treated in the same way as the rape of a free woman, the punishment usually being the death penalty for the guilty party.

Although the law stipulated that slaves in the Romanian lands could not be witnesses, 17th-century judicial practice shows that slaves could testify in trials concerning the establishment of their legal status as slaves or free people. Another aspect that confirms their ambiguous status is the fact that slaves in the Romanian lands had property rights and could enter into loan agreements. (Constantin: 2018)

### **3. Legislative changes in the 18th and 19th centuries**

The next changes to slavery laws in the Romanian lands came in the 18th century during the Phanariot regime. In 1743, Nicolae Mavrocordat adopted a series of measures in Wallachia aimed at regulating the marriage of slaves. The main legislative norm was the explicit prohibition of the separation of marriages between slaves belonging to different masters. Until then, this prohibition had been part of legal customs, without having the force of law. Another change concerned the prohibition of turning a free person who had married a slave into a slave. The free person was to retain their freedom, and the children born of such a marriage were also to be free. A similar rule was adopted in 1766 in Moldova, but it allowed the dissolution of a marriage between a slave and a free person, with the stipulation that any children from such a marriage would be free. However, in Moldavia, these provisions were reversed in 1785, when marriages between slaves and free persons were prohibited, and if such marriages did occur, the children resulting from them were to be slaves. In order to avoid the separation of families, slave exchanges were provided for so that the claims of different owners could be satisfied (Achim: 1998).

In 1780, the Ipsilanti Code was adopted in Wallachia, explicitly granting slaves a dual status: that of property, as they could be given as dowries (as well as sold or bequeathed), but at the same time they were also considered persons (Constantin: 2018). The rest of the provisions relating to slaves in the Ipsilanti Code largely concern issues related to marriages between slaves with different owners and those between slaves and free people. For marriages between slaves with different owners, the exchange of slaves was preferred, while marriages between slaves and free people were prohibited; if they did occur, they were to be dissolved and the children remained free (Rădulescu: 1957).

In 1818, a new code of laws, the Caragea Code, was adopted in Wallachia. It defined slavery briefly as "Slaves are those who are the property of another." The Caragea Code established that the master did not have the right to kill his slave, but he could sell or give him away. Those born to a slave father and mother or to a slave mother alone remained slaves, and marriages between slaves and free people were prohibited. If a slave's master allowed him to marry a free person, this would result in the slave becoming a free person. (Stoenescu: 1905)

In Moldova, legislation on slavery was updated in 1817 through the Calimach Code, which provides the following definition of slavery: "Slavery and everything that has to do with ownership, although they are against the natural right of human beings, have been common of old in this Principality, not as the Romans did for a while, but in a special way. For here the power of the master can never be extended upon the slave's life, under any circumstances; and upon his slave property only when he is not legally justified or the slave has no heirs, or when, fleeing without returning, he will not necessarily have heirs (as are the sons and parents), or when he will harm or damage his master by theft or other wicked deeds. Also, it is clearly known that the slave is not considered as an object, and his deeds, connections, rights, and duties in relation to others but not to his master are taken into account, so he is considered to be a person; therefore, the slave is subject to and is protected by secular laws". (Furtună: 2021) It is worth noting that this definition of slavery expressly excludes the killing of the slave by the master and emphasizes that the slave was considered a human being, who had property rights and was protected by the laws in force. The other provisions of the Calimach Code refer to the prohibition of marriage between slaves and free persons, the release from slavery of children resulting from such mixed marriages, and the principle of replacement in cases of marriages between slaves with different masters.

#### **4. Conclusion: the slavery system in the old Romanian legal system**

Looking at the evolution of old Romanian legislation on slavery, we see that as early as the 15th century, slaves were considered persons, according to the definition in Matei Blastares' Syntagma, which states that slavery is a consequence of war and against the natural law that made all men free. Romanian legislation in the 18th and 19th centuries returns to similar definitions of slavery, in which slaves are explicitly considered persons. Thus, slaves were defined in ancient Romanian legislation as human beings deprived of freedom. The master's right of life and death over his slaves is not confirmed by any of the old Romanian legislative codes; from the 17th century to the beginning of the 19th century, the prohibition of killing slaves is explicit. For the 17th century, we have documentary evidence of at least one



conviction against a master who killed his slaves (Constantin: 200). From a legal point of view, the killing of a slave was treated identically to the killing of a free man, and there is also evidence of convictions for the killing of slaves by other slaves or free men who were not the victims' masters.

Regarding the existence of a possible "jus primae noctis" exercised by slave owners in the Romanian countries, it must first be said that this myth has been repeatedly debunked in international historiography (Boureau: 1998). "Jus primae noctis" is not documented in any form in the Romanian countries for the medieval period, and rape, along with murder, was considered a capital crime punishable by death, regardless of whether the victim of rape was a free woman or a slave. Sexual abuse was certainly possible in a master-slave power relationship, but from a legal point of view, women in slavery were treated on an equal footing with free women.

Mixed marriages between slaves owned by different masters or between a slave and a free person were the focus of legal codes in the 18th century. Lawmakers always tried to find a way to prevent the separation of already formed families, but the prohibition of marriage between slaves belonging to different masters or between slaves and free people was obviously not respected. The principle pursued by legislators was to preserve family unity, usually proposing a form of compensation or exchange between masters, but there are cases where the dissolution of marriages and the separation of families is attested.

Last but not least, it should be mentioned that slaves in the Romanian countries had ownership rights over their own property. Thus, there are records of sales contracts or loan agreements concluded by slaves, lists of goods owned by slaves, and even at least one case of a slave who owned another slave (Constantin: 2009).

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# Healthy sports physical activity and relationship to cognitive performance and physical fitness among secondary school students In Algeria

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## **Abstract**

*Background:* This study addresses the importance of sports participation in improving both physical fitness and cognitive performance among adolescents. Previous research suggests that regular physical activity can positively influence academic performance, but few studies focus on secondary school students in Algeria. *Objective:* The aim of this study was to explore the relationship between healthy sports participation, physical fitness, and cognitive performance in secondary school students in Guelma, Algeria. *Methods:* The research involved 30 secondary school students from Guelma, divided into two groups: one group practicing regular physical activity and another group not participating in any physical activity. Four tests were used: the 5-minute Brixie endurance test and the 2 kg medicine ball throw test to assess physical fitness, and mathematics and physics science tests to assess cognitive performance. Data collection took place in April and May 2024. Statistical analysis was carried out using SPSS version 25, with arithmetic mean, standard deviation, and independent sample t-test ( $p < 0.05$ ). *Results:* The results showed that students who engaged in physical activity scored significantly higher in both physical fitness and cognitive performance. Specifically, those who participated in physical activity had higher endurance scores ( $M = 1452.76$ ,  $SD = 117.78$ ) and strength scores ( $M = 9.43$ ,  $SD = 6.50$ ). In terms of cognitive performance, students who practiced sports scored better in both mathematics ( $M = 13.50$ ,  $SD = 1.29$ ) and physics ( $M = 13.97$ ,  $SD = 1.94$ ), with statistically significant differences ( $p < 0.05$ ). *Conclusions:* The findings of this study suggest that regular participation in physical activity has a positive effect on both physical fitness and cognitive performance. Adolescents who engage in sports not only exhibit superior physical health but also show enhanced academic performance. Thus, promoting healthy sports programs in schools is crucial for fostering overall well-being and academic achievement.

**Keywords:** health, sports physical activity, cognitive performance, physical fitness, secondary school.

## **1. Introduction**

Health and well-being have long been associated with exercising sports. adolescents who lead active, healthy lifestyles develop a strong musculoskeletal system, lower their chance of contracting chronic illnesses, sharpen their cognitive abilities, and boost their sense of self. It is well acknowledged that physical activity has positive effects on children's and teenagers' cognitive development, brain health, and, ultimately, academic success, in addition to its well-known health benefits. Physical exercise may have a direct and indirect impact on academic achievement across a number of physiological, cognitive, emotional, and learning variables, according to this evidence. After all, young people who participate in the most physical exercise have the chance to improve their mental and physical well-being as

well as to strengthen their sense of self-worth and self-efficacy, which will ultimately help (Latino & Tafuri, 2023).

Physical activity plays a vital role in promoting both the physical and psychological well-being of adolescents. During adolescence, which represents a critical developmental stage, regular participation in physical exercise supports healthy growth, improves fitness levels, and contributes to the prevention of various health problems such as obesity, cardiovascular disease, and anxiety (Janssen & LeBlanc, 2010). Furthermore, engaging in structured physical activities has been associated with improved self-esteem, emotional stability, and stress management among high school students (Biddle, Ciacconi, Thomas, & Vergeer, 2019). As such, schools are increasingly encouraged to integrate sports and physical education programs as an essential component of holistic adolescent development (World Health Organization [WHO], 2020).

In addition to physical health, several studies have highlighted the positive impact of physical activity on cognitive functions, including memory, attention, and information processing speed. Exercise enhances cerebral blood flow, increases neuroplasticity, and stimulates the release of neurotrophic factors that facilitate learning and cognitive development (Hillman, Erickson, & Kramer, 2008). Evidence suggests that adolescents who engage in regular physical activity tend to perform better academically, especially in subjects that require problem-solving and critical thinking, such as mathematics and science (Donnelly et al., 2016). These findings emphasize that physical education should not be viewed merely as recreation, but as a core contributor to intellectual performance.

Moreover, sports participation fosters cognitive engagement through coordination, concentration, and decision-making processes inherent in athletic activities. For instance, team sports often require strategic thinking, anticipation, and communication, which strengthen executive functions related to academic success (Voss, Kramer, Basak, Prakash, & Roberts, 2010). Physical exercise also enhances brain function by stimulating the hippocampus and prefrontal cortex, areas responsible for learning and memory (Esteban-Cornejo et al., 2015). Consequently, physically active students are better equipped to handle complex academic tasks, leading to improved scholastic outcomes.

Although the precise processes via which exercise improves cognitive function are not entirely understood, it is known that aerobic exercise raises the synthesis of chemicals such as brain-derived neurotrophic factor, which are thought to be important for cognitive function (Barnett, 2011). When automatic reactions are not suitable, cognitive control refers to a collection of top-down cognitive processes, sometimes referred to as executive functions, that enable the management of attention and behavior. Core cognitive control functions include cognitive flexibility, working memory, and inhibitory control. Even when IQ is taken into account, individual differences in cognitive control are linked to academic success in preschool and throughout the school years. Therefore, efforts have been made to find therapies that can consistently improve cognitive control abilities and demonstrate a positive correlation with academic results. The investigation of whether exercise may enhance cognitive functions is one field of inquiry that has expanded recently (Vasilopoulos et al., 2023).

Physical activity is crucial for children's mental and physical health, as well as their cognitive and physical development and psychological well-being. Indeed, an increasing number of studies have demonstrated that academic achievement is linked to aerobic fitness, a pertinent indicator of children's cardiovascular health, and that PA and its physiological aftereffects, including aerobic fitness, are the cause of individual differences in cognitive function and academic achievement. The association between children's physical fitness indicators (such as aerobic fitness, motor ability, and muscular fitness) and academic success is interestingly mediated by executive skills, according to a few recent research (Yangüez et al., 2024). Therefore, the public health agenda's promotion of physical exercise to enhance children's and teenagers' physical, mental, and cognitive health has compelling justification. Over the past twenty years, there has been a surge in research investigating the impact of both acute and chronic physical exercise on children's and teenagers' academic performance. (Muntaner-Mas et al., 2024).

Despite these well-documented benefits, the relationship between physical activity and cognitive performance among Algerian adolescents has received limited empirical attention. Understanding how sports participation affects both physical fitness and academic performance in this population is essential for developing evidence-based educational and health policies. Therefore, the current study aims to examine the link between healthy sports participation, physical fitness, and cognitive performance among secondary school students in Guelma, Algeria. By comparing students who regularly engage in physical exercise with those who do not, the study seeks to provide a scientific basis for promoting physical education as a means to enhance academic achievement and overall well-being (Singh et al., 2019).

## **2. Materials and methods**

### **Study participants**

30 secondary school students from the Guelma province of Algeria participated in the study; 15 of them engaged in physical exercise, while the remaining 15 did not. They were chosen at random.

### **Study design**

To differentiate between exercisers and non-exercisers in the study variables, the research sample was subjected to the following four tests:

- Physical fitness (endurance test, strength test).
- Cognitive performance (mathematics test, physics science test).

The following phases comprised the research, which was carried out in April and May of 2024 :

- In April 2024, the endurance test was administered and assessed between April 23 and April 26.
- From April 27, 2024, to April 29, 2024, the strength test was carried out and assessed.
- From May 3 to May 6, 2024, the mathematics test was assessed.
- The evaluation period for the Physics Sciences exam was May 07–May 09, 2024.

## Measurements

Among the field tests used in the study are the following ones:

### endurance Test

The 5-Minute Brixie Test

The test aims to measure the maximum oxygen consumption as well as the effectiveness of the respiratory and circulatory systems.

Test Description: During the allotted five minutes, the most distance must be covered.

Procedure for recording grades: The total distance covered throughout the test time is computed.

### Strength test

Test of medicine ball throwing:

The test's objective is to measure arm muscular strength.

Equipment: a measuring tape and a 2 kilogram medicine ball.

In order to conduct the test, the tester stands behind the starting line, holding the ball in both hands. He then swings his arms and throws the ball as far away as he can while keeping his back to the throwing area or measuring tape.

grades for the method record: The best of the tester's three efforts is counted, and the distance is measured to the closest 5 cm.

- Evaluation of cognitive performance test grades in mathematics and Physics sciences.

### Statistical analysis

- The statistical analysis of the research was conducted using SPSS version 25 software.

- Both the standard deviation (SD) and the arithmetic mean.

- For independent samples, use the T test.

- The research's significance criterion was set at a 95% confidence interval, or ( $p < 0.05$ ).

## 3. Results

**Table. 1.** Statistical analysis of the results for the Brixie 5min Test.

| <b>Endurance: Brixie 5min Test</b> |                   |                   |
|------------------------------------|-------------------|-------------------|
| test grade                         | Practice variable |                   |
|                                    | practitioners     | non-practitioners |
| N                                  | 15                | 15                |
| M                                  | 1452,76           | 1051,57           |
| SD                                 | 117,78            | 105,88            |
| T test                             | 9,810             |                   |
| df                                 | 28                |                   |
| Significance level                 | (p < 0.05)        |                   |
| Sig                                | 0,00              |                   |
| Statistical estimate               | significant       |                   |

Source. Present research

In the endurance test (Brixie 5-minute test) for the Physical fitness variable, the arithmetic mean of students who practiced sports physical activity was 1452.76 with a standard deviation of 117.78, which is higher than the arithmetic mean of non-participants, which was 1051.57 with a standard deviation of 105.88, as shown in Table (1). After then, we look at the outcomes of the next test (t) to see if this difference is statistically significant. The table indicates that the value of (t) computed at degree of freedom (28) equals (9.810). The differences between practitioners and non-practitioners in terms of the endurance test are statistically significant and in favor of practitioners given the variable of engaging in healthy sports physical activity because the degree of significant probability (sig=0.00) is lower than the significance level ( $p < 0.05$ ).

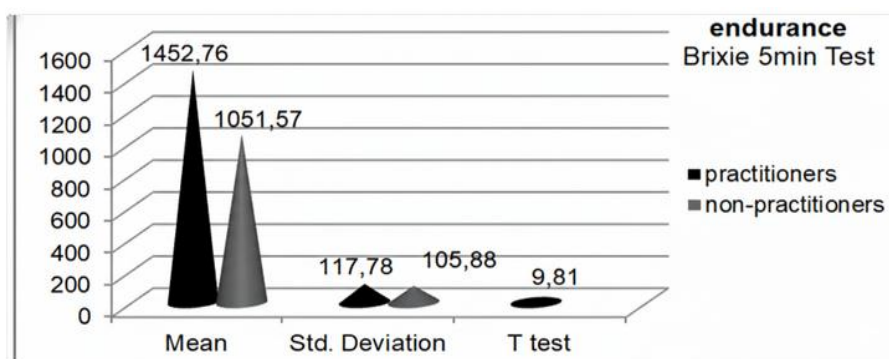


**Figure. 1 .** Graph of the Mean and std Deviation of the Brixie 5min Test.

**Table. 2.** Statistical analysis of the results for 2 kg medicine ball throw test.

| <b>Strength: 2 kg medicine ball throw test</b> |                   |                   |
|------------------------------------------------|-------------------|-------------------|
| test grade                                     | Practice variable |                   |
|                                                | practitioners     | non-practitioners |
| N                                              | 15                | 15                |
| M                                              | 9,43              | 6,50              |
| SD                                             | 0,86              | 1,47              |
| T test                                         | 6,644             |                   |
| df                                             | 28                |                   |
| Significance level                             | (p < 0.05)        |                   |
| Sig                                            | 0,00              |                   |
| Statistical estimate                           | significant       |                   |

Source. Present research

In the strength test (2kg medicine ball throw test) for the Physical fitness variable, the arithmetic mean of athletic participants was 9.43 with a standard deviation of 6.50, higher than the arithmetic mean of non-participants, which was 0.86 with a standard deviation of 1.47, as shown in Table (1). After then, we look at the outcomes of the next test (t) to see if this difference is statistically significant.

The table indicates that the value of (t) computed at degree of freedom (28) equals (6.644). Given the variable of engaging in healthy physical sports, the strength test results of practitioners and non-practitioners differ statistically significantly, favoring practitioners because the degree of significant probability (sig=0.00) is lower than the significance level ( $p < 0.05$ ).

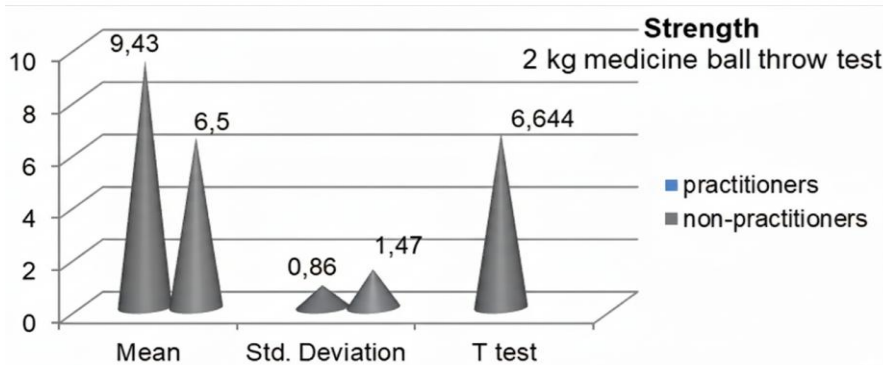


**Figure .2.** Graph of the Mean and std Deviation of the medicine ball throw test

**Table.3.** Statistical analysis of the results for the mathematics test.

| mathematics Test     |                   |                   |
|----------------------|-------------------|-------------------|
| test grade           | Practice variable |                   |
|                      | practitioners     | non-practitioners |
| N                    | 15                | 15                |
| M                    | 13,50             | 9,43              |
| SD                   | 1,29              | 2,47              |
| T test               | 5,646             |                   |
| df                   | 28                |                   |
| Significance level   | (p < 0.05)        |                   |
| Sig                  | 0,00              |                   |
| Statistical estimate | significant       |                   |

*Source.* Present research

In assessing the grades on the mathematics test for the cognitive performance variable, the arithmetic mean of those who participate in physical sports was 13.50 with a standard deviation of 1.29, higher than the arithmetic mean of those who did not, which was 9.43 with a standard deviation of 2.47, as shown in Table (1). To ascertain whether or not this difference is statistically significant, we next look at the outcomes of the next test (t). The value of (t) computed at the degree of freedom (28) is equal to (5.646), as can be seen from the table. Because the degree of significant probability (sig=0.00) is lower than the significance level ( $p < 0.05$ ), the



differences between practitioners and non-practitioners in terms of the mathematics test are statistically significant and in favor of practitioners given the variable of engaging in healthy physical sports activity.

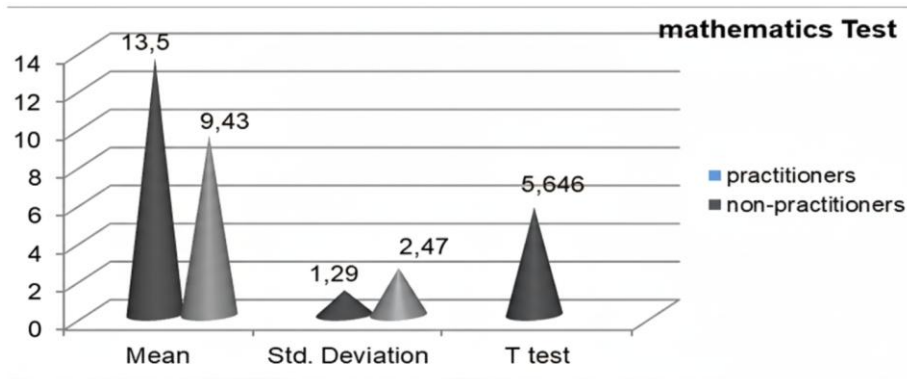


**Figure 3.** Graph of the Mean and std Deviation of the mathematics test.

**Table .4.** Statistical analysis of the results for the physics sciences test.

| Physics sciences test |                   |                   |
|-----------------------|-------------------|-------------------|
| test grade            | Practice variable |                   |
|                       | practitioners     | non-practitioners |
| N                     | 15                | 15                |
| M                     | 13,97             | 1,94              |
| SD                    | 9,80              | 1,68              |
| T test                | 6,267             |                   |
| df                    | 28                |                   |
| Significance level    | (p < 0.05)        |                   |
| Sig                   | 0,00              |                   |
| Statistical estimate  | significant       |                   |

Source. Present research

In assessing the grades on the physics sciences test for the cognitive performance variable, the arithmetic mean of students who engage in physical activity was 13.97 with a standard deviation of 9.80, which is higher than the arithmetic mean of non-participants, who scored 1.94 with a standard deviation of 1.68, according to the data in Table (1). After then, we look at the outcomes of the next test (t) to see if this difference is statistically significant. The table indicates that the value of (t) computed at degree of freedom (28) equals (6.267). Given the variable of engaging in healthy physical sports, the physics sciences test results show statistically significant differences between practitioners and non-practitioners that favor practitioners because the degree of significant probability (sig=0.00) is lower than the significance level ( $p < 0.05$ ).

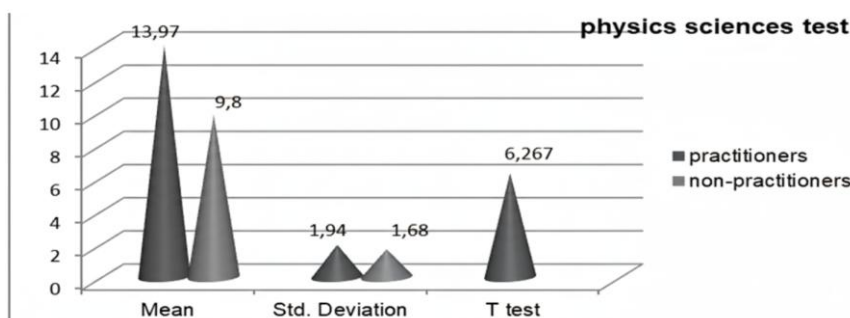


**Figure .4.** Graph of the Mean and std Deviation of the physics sciences test.

#### 4. Discussion

The results of the current study demonstrate that playing sports improves physical health and, consequently, cognitive performance in various academic subjects for practicing students, whether in physical education classes or during leisure time. This leads to preference in academic achievement, concentration, and cognitive awareness, and ultimately to good results in the academic path. This is because we found that there is a difference in the evaluation of test results between practitioners and non-practitioners of physical sports activity, favoring practicing students who obtained high scores in the cognitive performance variable for mathematics and physical science tests. This study helps us understand how good sports practices affect physical health and improve cognitive performance among secondary school students. However, we also analyzed the results of the physical fitness variable tests regarding the endurance test and the muscular strength test, and we found that there is a large difference in the level of physical fitness (endurance, strength) between practitioners and non-practitioners of sports exercises, which is in favor of practicing students to varying degrees. This indicates that practicing students have good physical health and good cognitive performance in their academic achievement in various scientific subjects, and this is due to the variable of healthy sports practice among them. and here we find many studies that agree with Our current study on the role of healthy sports practice in improving physical fitness and cognitive performance for different educational stages.

The research thoroughly examines the ways in which physical exercise improves children's academic performance and cognitive function. By highlighting the physiological, emotional, and social elements that mediate these gains, it underlines how important active lifestyles are for improved academic achievement and cognitive growth (Latino & Tafuri, 2023).

Activity is associated with improved cognitive performance in schoolchildren; research shows that both short bursts of activity and long-term exercise can improve academic performance and intelligence, especially in executive functioning processes (Barnett, 2011). Basic cognitive abilities like memory and more advanced ones like thinking and decision-making are both improved by exercise. More intellect, more academic achievement, and enhanced

social relationships—especially in kids and teenagers can result from this development (Zarzecka, 2014).

The discovery that physical exercise treatments have a favorable impact on children's cognitive function and academic success, including improving their working memory, creativity, on-task behavior, and fluid intelligence, with significant advantages for language and math results (Vasilopoulos et al., 2023). the connection between children's academic success and aerobic fitness, stressing the indirect contributions of intellect and executive processes, and underlining the importance of cognitive flexibility in relating aerobic fitness to arithmetic proficiency (Yangüez et al., 2024)

The effect of fitness and physical exercise on academic achievement, examining conflicting findings in previous research. It seeks to examine these impacts as well as how teacher abilities contribute to the implementation of successful interventions for kids and teenagers (Sember & Premelč, 2024). Cardiorespiratory fitness, in particular, has a significant impact on children's academic performance and psychological well-being. It also highlights distinct trajectories for boys and girls and emphasizes the need of regular physical exercise over screen time restriction (Jaekel, 2024).

Children in school benefit academically from physical exercise; sessions should last between thirty and sixty minutes, and moderate to intense intensity is linked to better academic results and cognitive function (James et al., 2023). the immediate impacts of physical exercise on academic results in school-aged children, discovering that a single physical activity session may significantly enhance behavior modification strategies and academic achievement, especially in language and arithmetic (Muntaner-Mas et al., 2024).

That playing sports has a favorable effect on young people's cognitive abilities, especially their inhibitory control. It does point out, though, that academic achievement and cognitive ability do not strongly correspond, indicating that variables other than fitness and physical exercise affect educational outcomes (Campos et al., 2024). As demonstrated by improved diastolic function, greater left ventricular muscle mass, and decreased resting heart rate, moderate exercise dramatically increases cardiac fitness. These gains are especially noticeable in sedentary people, promoting long-lasting behavioral shifts in favor of physical exercise (Pavlik et al., 2018). Teenagers who engage in high-intensity exercise training see notable improvements in their muscular fitness, cardiovascular health, and body composition. In order to maximize students' physical fitness results, the evaluation recommends that schools give high-intensity sports priority in their physical education curricula (Zhou et al., 2024).

Interventions including physical exercise greatly increase teenagers' cardiopulmonary fitness, especially in obese people. Greater advantages in blood pressure and maximum oxygen consumption are obtained from high-intensity exercise, highlighting the significance of exercise frequency and type for successful fitness gains (Wang et al., 2023). Teenagers who are physically active have far better muscular fitness the best results are obtained from short-duration, high-intensity, low-frequency workouts. For this age group, resistance training also yields significant advantages for improving muscular fitness (Wu et al., 2021).

Demonstrated giving teenage females supervised combined aerobic and strength training instead of traditional physical education greatly increased their muscular and cardiorespiratory fitness (Cohen et al., 2021). that maintaining physical fitness in teenagers, especially underweight females, requires engaging in health-promoting activity. It draws attention to a lack of engagement in physical activity and the necessity of customized programs to enhance body weight and physical health (Andrieieva et al., 2020). Adolescents who exercise regularly through aerobic, resistance, and flexibility training have better health-related fitness. Evidence suggests that teenagers recover more effectively from resistance training, which makes structured exercise regimens crucial (Smith et al., 2020). Adolescents who engage in more physical activity, especially those who meet the World Health Organization's recommendation of 300 minutes per week of moderate-vigorous activity, have much better cardiorespiratory fitness, which is essential for preventing overweight and obesity and improving general health in this age group (López et al., 2021). Teenagers might potentially avoid cardiovascular problems later in life by improving their cardiorespiratory fitness and decreasing body fatness, which can assist decrease exercise blood pressure and related cardiovascular risk (Huang et al., 2024).

Teenagers who engage in resistance training see a considerable improvement in their physical fitness, including improved lung capacity and running ability. A good physical intervention program fosters socializing and athletic enthusiasm, which in turn helps students do better academically (Hui., 2022). Because combining resistance and plyometric training greatly boosts adolescents' fitness performance by increasing their lower limb speed and explosive strength, two qualities that are essential for young people's overall athletic development and health-promoting lifestyles (Fischetti et al., 2019).

Improved cognitive performance, such as selective attention, focus, and processing speed, as well as improved psychosocial outcomes, such as self-efficacy, self-rated health, and life satisfaction, are associated with adolescents who exercise and become more fit (Reigal et al., 2020). Participating in organized sports greatly improves the muscular and cardiorespiratory fitness of teenagers. Higher levels of fitness are attained by consistent engagement, but the advantages of dropout are lessened. To encourage fitness in individuals who never participated or drop out, low-cost leisure activities are advised (Kolunsarka et al., 2023).

## 5. Conclusions

Secondary school students who participate in healthy physical education programs or in their leisure time have good physical health, according to the study's findings. Based on all the data gathered and analyzed from the assessment of the tests, this is clear from the physical fitness variable that compares the performance of practitioners and non-practitioners in the endurance test (5-minute brixie test) and the strength test (2 kg medicine ball throwing test). Consequently, the endurance test provided practitioners with an arithmetic mean (1452.76) and a standard deviation (117.78). For the strength test, practitioners received an arithmetic mean of (9.43) and a standard deviation of, (0.86) whereas non-practitioner students received an arithmetic mean of (1051.57) and a standard deviation of 105.88. While practitioners' scores on cognitive performance tests for

mathematics and physical science revealed that, when we analyzed the mathematics test, the arithmetic mean for practitioners was (13.50) with a standard deviation of (1.29) non-practicing students' scores on the same test were (6.50) with a standard deviation of (1.47). Conversely, non-practicing students who completed the same test had an arithmetic mean of (9.43) and a standard deviation of (2.47). The physical science exam results, on the other hand, were also assessed since the practitioners' arithmetic mean was (13.97) with a standard deviation of (1.94). In comparison, the identical exam had an arithmetic mean of (9.80) and a standard deviation of (1.68) for students who did not practice. Based on these field-analyzed data, we conclude that there is a statistically significant difference between those who participate in physical sports and those who do not, favoring practitioners in all research variables, including physical fitness and cognitive performance.

We may draw the conclusion that kids who engage in physical exercise and healthy sports have better physical health and do better cognitively in their academic endeavors than their peers who do not, based on the facts presented. Students who engaged in physical sports activities outperformed those who did not, as seen by their improved exam scores.

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## **Two Generations, A Vocation: Comparative Study Between Students Cohorts In Social Work, Faculty Of Sociology And Social Work, West University Of Timisoara**

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### **Abstract:**

*The paper aims to identify the trends regarding the similarities and differences between students enrolled in the studies of the license in the field of social work, cohorts 2024 and 2025. The research is quantitative with a focus on objectivity and clarity. The research sample consists of 145 students enrolled in the social work specialization - frequent education, Faculty of Sociology and Social Work, West University of Timisoara. The main results show that the research hypotheses are valid because most of the students in both student cohorts are female. At the same time, most students come from small families, with 3 or 4 family members, because with the globalization and evolution of society, birth rates have decreased and numerous families are no longer so present. It is clearly seen from the analysis of the data that most of the students from both cohorts live in rent and at home, together with the parents, being more centered on personal space, privacy and at the same time the lack of places in the student dormitory is highlighted. The differences that arise between the two study cohorts are generally related to the way they look at the field of social work, knowledge in the field, but also from where they heard about social work. The practical implications of the study support that the promotion of this field should also be carried out among men to create a balance between genes, but also the promotion of the profession so that future students learn the importance of the social worker in the Romanian society.*

**Keywords:** questionnaire, social work, students, trends, profile

### **Introduction**

The article „Two generations, a vocation: comparative study between student cohorts in Social Work, Faculty of Sociology and Social Work, West University of Timisoara” provides an objective perspective on the motivation demonstrated by students from the 2024 and 2025 cohorts when enrolling in the Social Work program. It is important to observe the profile of social work students, defined by their gender, background, age, and the path they chose after completing high school. All these characteristics—combined with the type of family they lived in, diagnosed chronic illnesses, family members, and their place of residence during studies—reveal to national research both the positive aspects and the vulnerabilities of current students enrolled in undergraduate social work programs.

In Romania, research on trends in social work—particularly studies focusing on the profile of students or graduates of accredited undergraduate social work programs—is insufficient and even non-existent. Notable in this context is the study



conducted by Lazăr (2015), which focused on the general profile of social workers in Romania. The results showed that exactly ten years ago, only 4,607 individuals were registered with the National College of Social Workers of Romania, 88% of whom were female, with an average age of 36 years. Furthermore, the social work profession is predominantly female, including both newcomers—recent graduates—and professionals with work experience in the field.

Bulgaru (2013) noted that the current context is transforming the methods used in educating social workers, as globalization requires professionals in the field to be prepared for a new type of intervention—innovative and problem-centered social practice. The author particularly emphasizes the need for intercultural competencies. She describes the models proposed by Healy and Estes, which focus on adapting university curricula to the international level in order to make interventions more realistic and applicable. Among the innovative disciplines with potential to enhance students' competencies are: case management, social gerontology, rural social work, social work in international contexts, emotional intelligence, and the social worker's role in preventing and combating human trafficking. (Buzducea, 2009)

All these subjects are already included in the Social Work undergraduate program at the West University of Timișoara, which is aligned with the training and professional standards of the social work profession.

Also, 11 years ago, the international literature was already discussing the importance of international practice placements aimed at the professional training of social workers. Cleak et al., (2014) argued that international placements contribute to the development of critical thinking, professional flexibility, and intercultural knowledge. The research results indicated that the majority of students enrolled in undergraduate social work programs were female, and that through international learning they discovered new skills, learned new models of intervention, developed their professional competencies, and had greater opportunities to work in fields such as migrant protection and community development, drawing inspiration from international practice models. (Bell & Anscombe, 2012; Nuttman-Shwartz & Berger, 2011)

In the international literature, university training programs for social workers are not perceived solely from a theoretical perspective focused on coursework, but rather as having much deeper and more practical implications—shaped by professors seen as mentors, by interactions within the student community, and by field practice experiences. (Miller, 2013)

Peterson et al., (2014) conducted a study that examined the educational patterns of students enrolled in both undergraduate and master's social work programs, and how these patterns influence their professional development. The study's conclusions indicate that a welcoming and positive environment—among students, university faculty, and social workers in the institutions where field placements take place—is associated with a stronger sense of independence, autonomy, and the formation of a professional identity.

The present study also explores the motivation of students to enroll in the undergraduate Social Work program. In this regard, Ornovețchii (2022) conducted research demonstrating the internal and external factors that influence career choice. The study begins by presenting theories of motivation related to professional

development: Bodrov identifies three stages of professional motivation—choosing a long-term profession, selecting the institution where one will work, and the direct performance of professional duties. Holland argues that career choice is linked to individual personality, based on six types: realistic, investigative, artistic, enterprising, social, and conventional. Super emphasizes that choosing a career is more closely related to self-image, self-esteem, and self-confidence, being a process influenced by the stage of life in which the person finds themselves—development, exploration, establishment, maintenance, or disengagement. It can be observed that motivation is connected to multiple aspects, ranging from personality traits to external influences. (Swanson & Fouad, 2014; Schein & Maanen, 2013)

Simcenco (2021) published a study discussing social impact and inner satisfaction as strong sources of motivation in choosing a professional career. These factors can also serve as motivational drivers for specialists in the field of social work. Additionally, other factors can be identified, such as financial security, quick employment opportunities, professional stability, contribution to societal development, providing support to vulnerable groups particularly the elderly and children—and the desire for personal growth and development. (Pânișoară & Pânișoară, 2010)

Professional motivation and the achievement of performance in one's field of activity are well-researched topics in the specialized literature; however, they are not extensively explored within the field of social work. Zubenschi (2016) argued that there is not a single ability, value, principle, or motivation that drives individuals, but rather a combination of factors and mixed influences that inspire a desire for both personal growth and contribution to the common good. Rădulescu-Motru (1997) developed the concept of the “person of vocation,” referring to an individual's calling to do good, their authenticity, and their genuine commitment to collective well-being.

Zubenschi (2016) study included teachers, social workers, and doctors, based on the premise that these professionals contribute directly to the welfare of society. The results indicated that motivation tends to decrease with professional experience and age. Moreover, burnout is more prevalent among professions focused on human interaction and collective welfare, and this professional exhaustion reduces the motivation to do good. In the field of social work, it was observed that professionals tend to align more strongly with altruism and empathy rather than with leadership-oriented traits.

Souto-Otero et al., (2023) link the motivation behind choosing a field of study to the way students understand the employment process. The research hypothesis starts from the premise that the university study program influences one's professional career. Furthermore, the university also changes the perception of how students understand employability and professional performance. There are two conceptions of employability: “Thin” refers to educational performance, professional training, and academic qualifications, while “Thick” is directly related to practical experience, the acquisition of knowledge, skills, and competences. Studies in the field show that human-oriented professions are usually chosen out of vocation rather than for economic or financial reasons. However, as in any domain, there are also students who, by pure chance, end up studying a certain specialization and later realize that it suits them, developing a strong vocational motivation. (Anastasiadis & Zeyen, 2022; Bright et al., 2022)

The choice of a career in social work can also be observed through the volunteering experience that young people acquire before enrolling in undergraduate studies. Pituła et al., (2022) consider that volunteering holds a special significance in the current period, as it reflects the motivation to bring about change and to become actively involved, motivations which stem from diverse personal factors. Volunteering is perceived as a form of humanitarian support and solidarity, both towards others and towards society as a whole. In a constantly changing world, affected by humanitarian crises, the actions of volunteers—whether individual or organized—are perceived as expressions of responsibility and civic engagement. (Nichol et al., 2022; David, 2024)

Collins et al., (2010) conducted one of the first British studies focused on the well-being of students enrolled in social work programs. The students' responses show that they experience the responsibilities of their academic program from multiple perspectives. A percentage of 81% expressed a strong desire to perform well in their courses and to maintain full attendance in academic activities. Moreover, it was observed that students who had not previously participated in volunteer activities found the study experience significantly more challenging. In addition to the difficulties and stress encountered, there are also positive aspects related to the personal satisfaction they experience during field placements, as beneficiaries are perceived as a source of energy and well-being. It can be seen that the passion for helping others and the sense of vocation play an important role in choosing this field of study, as they help compensate for the challenges faced.

Even within higher education programs focused on social work, students may experience doubts, questions, and uncertainties. In this context, the effectiveness of initial assessment becomes essential for observing student retention. The main concern is related to the process of employment and professional integration. Ross et al., (2024) emphasized that professional identity can also be developed through the direct involvement of students in research processes, allowing them to become active participants in practice. The study indicates that through direct engagement and research experience, students can achieve better outcomes in learning, personal development, and overall wellbeing.

The initial assessment of social work students can provide educators with insights into their levels of resilience or emotional intelligence. It is the responsibility of educators to train students who are able to overcome barriers and effectively manage the challenges of the social work profession. Understanding students' wellbeing is closely linked to their level of resilience and the competencies associated with it. (Grant & Kinman, 2012)

The international literature on social work education refers directly to self-care, to each student's level of emotional intelligence, and to the development of practical rather than purely theoretical skills, such as overcoming burnout and fostering empathy and compassion. All these aspects represent a set of characteristics through which the future social worker is shaped physically, emotionally, spiritually, socially, and professionally. O'Neill et al., (2019) emphasize that the way students are engaged in activities throughout their university studies can strengthen their confidence and self-esteem and help prevent professional burnout in the future.

As presented, the Romanian national literature does not thoroughly explore the need for initial assessment of students enrolled in social work programs and

offers limited analysis of the relationship between future professional performance and the motivation behind choosing social work as a field of study. At the international level, there are studies addressing these aspects; however, gaps still exist, particularly regarding contemporary developments. The present study examines differences between cohorts of social work students to identify similarities and variations over time, even within a one-year interval.

### **Methodology**

The purpose of the research is to observe the trends and differences between the cohorts of students admitted in 2024 and 2025 to the specialization Social Work - Frequency Education, Faculty of Sociology and Social Work, West University of Timisoara.

### ***Research Hypotheses***

H1: Students in both cohorts are aged between 18 and 19, indicating a direct transition from high school to university.

H2: Students in both cohorts are predominantly female.

H3: Both cohorts of students have prior experience in volunteer activities.

### ***Sample and instrument***

The quantitative method, respectively sociological anchor, was used by questionnaire. The tool collected data on the initial evaluation and the reasons why they chose social work - frequent education from the Department of social Work, the Faculty of Sociology and Social Work, the West University of Timisoara. The sociological survey through the questionnaire was applied at the beginning of the academic year 2024 and 2025, with implications also on socio-demographic aspects in order to better understand the profile of the student at social work.

Babbie (2020) specified how important the stage of elaboration of the questionnaire is for it to be valid. It all starts with the clear and objective formulation of the questions, then there is a pre-testing period, marked by the actual data collection and statistical analysis.

### ***Data collection and processing***

Data collection was carried out through two questionnaires containing identical items, administered during the first meeting with each cohort of students admitted to the Social Work program (full-time), Faculty of Sociology and Social Work, West University of Timișoara. The first questionnaire, addressed to the 2024 cohort, was collected on the first day of the initiation week in September 2024, while the second questionnaire, addressed to the 2025 cohort, was collected in September 2025. A total of 145 students from both cohorts participated in the study, all of whom gave their full consent to take part in the initial evaluation and in the subsequent comparative research.

## Results and Discussion

The main themes that emerge from the quantitative analysis of the collected data are: demographic profile of students enrolled in social work in 2024 and 2025.; students' perception towards the bachelor study program social work: frequency education; identification of differences between the cohorts of students 2024 and 2025; association of demographic variables with the variables of attitude and behavior.

The gender of respondents is divided as follows: 75 respondents in the 2024 study cohort declare themselves women, and 5 men versus 58 respondents in the 25 study cohort declaring themselves women, 6 men and 1 single respondent do not declare their gender. The environment of origin indicates for the 2024 cohort that 50 people coming from urban and 30 from rural areas, and for the 2025 cohort, 35 people come from urban areas and 30 from rural areas. There is a great trend towards enrolment in educational and socio-human studies of women. However, with the 2025 cohort, one can also notice a trend of male gender representation in human areas.

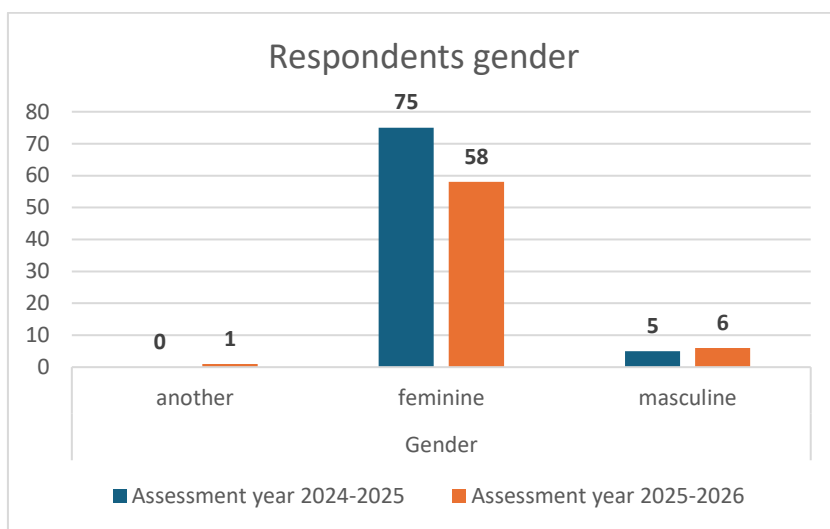


**Fig. 1**

The respondents' age shows that most are between 18-19 years, in the 2024 cohort, there are more 18-year-olds compared to the 2025 cohort. As for, the age of 19, remains constant in both cohorts. As for adults over 30, they are more present in the 2025 cohort, being a diversification of older age compared to 2024. Regarding the environment in which students graduated from high school, 76 of those enrolled in 2024 graduated in urban areas, and 4 in rural areas compared to 59 enrolled in 2025 who graduated in urban areas and 6 in rural areas.

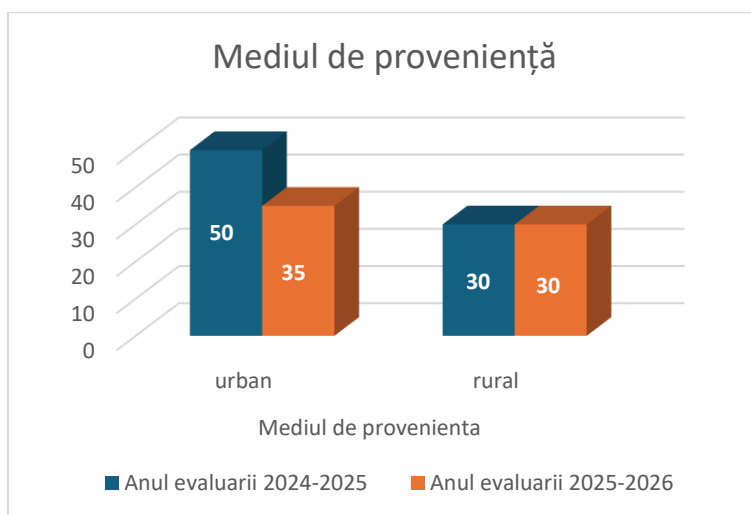
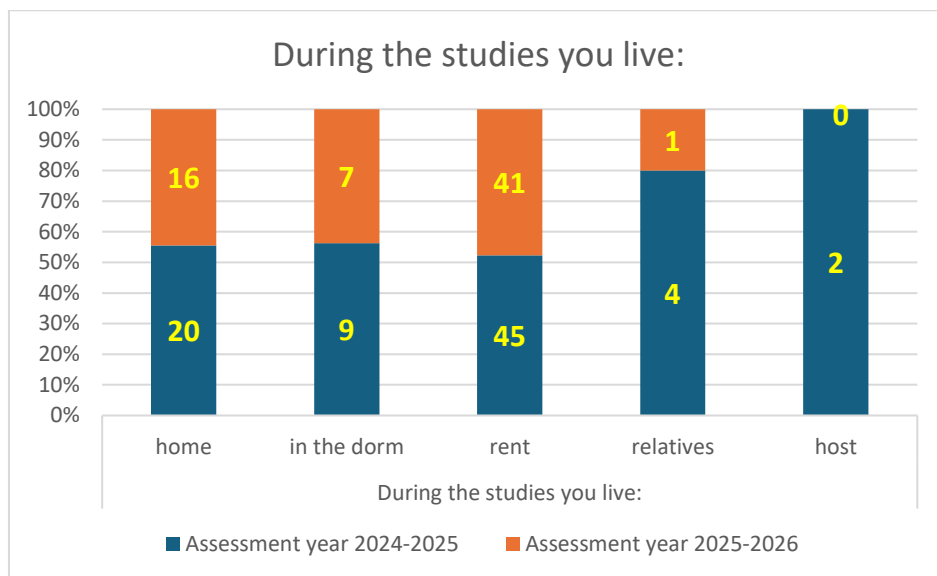


Fig. 2

There is also a decrease in urban respondents and an increase in rural respondents, as of 2025, an accessibility of university education for rural high school graduates is observed. Regarding this analysis of the two cohorts of students, it is noted that traditional students are more distinguished in 2024, and the year 2204 comes with an age diversification for students „non-traditionalists” who resume studies or want a professional reorientation.

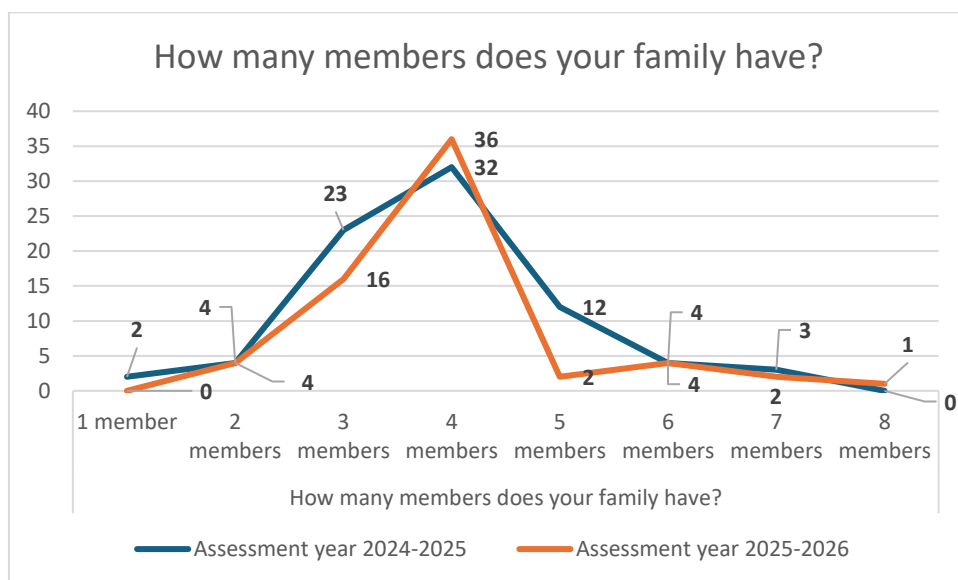
The family type of origin brings the following results: from the cohort 2024 students, 52 people come from a nuclear family, 18 from a single parent family, 6 lived with a biological parent and a step parent, 3 respondents have parents who left for work abroad, and 1 respondent has disabled parents. In the case of the 2025 cohort, it is noted that only 39 people come from nuclear family, 17 from single parent family, 5 participants in the study have parents working abroad and 4 have lived with a biological parent and a step parent.

In the case of chronic diseases that the respondents stated, it is noted that from cohort 2024, 76 declare that they have no chronic disease, and the others face diagnoses such as: polycystic ovary syndrome (a respondent), chronic headache (a respondent) and scoliosis (a respondent). In the 2025 cohort, 57 students stated that they do not manifest chronic diseases, and the others face spastic tetraparesis (a respondent), AIDS (a respondent), depressive-anxious syndrome (a respondent), myopic astigmatism (a respondent), hypothyroidism (two respondents).

**Fig. 3**

In 2025, there is a trend of openly declaring health conditions, even disability, which leads to transparency, as well as a greater openness of the university towards the educational and social inclusion of students with disabilities or chronic diseases.

For both the 2024 and 2025 student cohort, four-member families are the most present, with 36 and 32 students confirming this from the two cohorts. Nuclear families are the most dominant in the two generations. Then, the three-member families take the next place, with 16 respondents from the 2024 cohort, and 23 respondents from 2025. Numerous families with over 5 family members are rare and steadily declining. In the case of cohort 2024, there are 12 respondents coming from such a family, and in 2025, only four. For families consisting of 6-8 members there are extremely small values, located between 1-3 cases. A tendency to decrease the birth profile is observed, being a slight change, but also present, with a focus on small families, according to the trends in Romania, with urbanization and career desire.

**Fig. 4**

At question „During the period where you live”, the answers show in the following way: for cohort 2024, 20 respondents live at home with their parents, 9 students in the student dorm, 45 students for rent in Timisoara, 4 students at relatives and 2 students in a host. In the case of the 2025 cohort, things look similar because, 16 students live at home with their parents, 7 in the student dormitory, 41 students rent in Timisoara and one student at relatives. We notice a constant pattern of how students choose to live, and it is also noted that most students come from other counties and choose to rent in Timisoara for independence and comfort. There is, however, a low number of people living in the home for two reasons: limited number of seats or preference to larger space and independence.

On question „Why did you sign up for the Social Work” specialization, the respondents provided answers that design vocation and humanistic fields, and the similarities arise between both cohorts, because, 35 students in each cohort mentioned that they want to bring changes in the society. Other reasons that are in the second place of student responses bring the desire for continuous learning, improvement in a particular field, professional development, but also direct influences from the family. There are also respondents who point out that the surrounding cases inspired them to choose the field of social work.

When asked „Where did you hear about the social work field”, the main sources of information of the 2024 cohort show that they are family and former cohorts, followed then by social networks such as Instagram and Tik Tok. In the case of the 2025 cohort, there is a significant increase in the influence of social networks in the choice of domain, followed by the family. An intergenerational change can directly change, because if in 2024 the educational options were chosen according to the direct experiences of the family or graduates, they are now chosen according to the social channels and materials presented online.



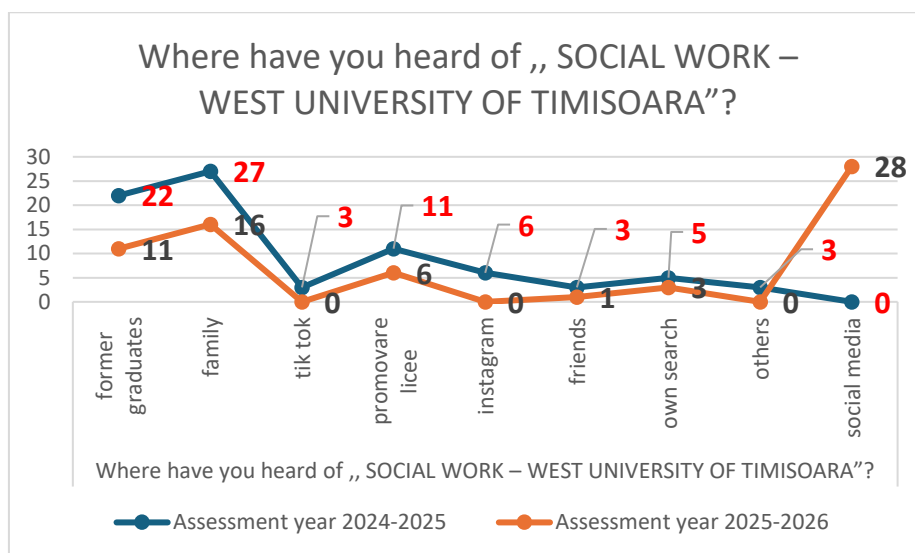
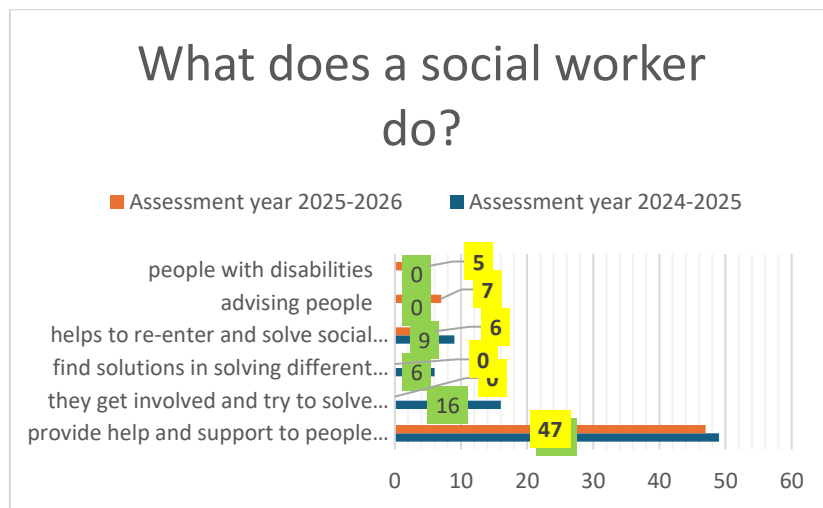


Fig. 5

In the initial assessment, respondents were asked „What a social worker does, and both cohorts had close answers, 49 students and 47 said that the role of the social worker is to provide support to people in difficult situations. A perception focused on the needs of the beneficiary and on overcoming the vulnerability situations is observed, an idea that remains present as intensely in both generations. An idea that appears in cohort 2024, but not in cohort 2025, is that the social worker solves community problems. Cohort 2025 links the social work assistant profession to specific work tasks, such as: „the social worker works with people with disabilities”, „helps to social reintegration” and advises people.

To question „What do you understand by the person in difficulty”, cohort 2024, respectively, 57 respondents indicated that it is „the person in difficulty is facing social problems, economy or personal”. Cohort 2025 did not want to answer this question, namely 65 people, with only 8 answers being similar to that of the 2024 cohort. We can see a drastic decrease in the level of social awareness, but also in the understanding of the terminology in the field of social work.

**Fig. 6**

To question „In which institutions can the social worker” profess, the main answer of the cohort 2024, is the school, respectively 24 respondents, then mayoralties, 16 answers, placement centers, 12 participants and prisons 11 respondents. A realistic, yet succinct knowledge of the 2024 cohort is observed. Cohort 2025 brings news, but the first two three places are also occupied by educational institution, town hall and placement centers, then hospital institutions and public institutions are added, being slightly more general answers. It can be seen that the social worker has gained an important role in educational institutions in the last two years.

Regarding the involvement in volunteering activities, the results of the quantitative analysis show that 21 respondents from the 2024 cohort were involved in volunteering activities and 24 did not volunteer. Instead, 35 students want to participate in volunteering activities in the future. In the 2025 cohort, there are several students who participated in volunteering activities, respectively, 26, and 16 did not participate. At the same time, 23 respondents want to volunteer.

**Fig. 7**

At the same time, the respondents' volunteering was done in general in hospital institutions, educational institutions and in recreational mode, 20% each, followed by nasaemnt centers, centers for people with disabilities and in non-governmental organizations in the percentage of 15% and 10%.

It can be seen that the differences exist between generations, even if there is a year difference, but the cohorts 2024-2025 have similarities and differences. The study presents in a quantitative and objective way the differences that are consistent, but also the similarities, achieving an objective profile of the student at social work from the contemporary period in Romania.

## Conclusions

Otovescu & Otovescu (2019) reported a phenomenon that is more and more present in the past years, but which is growing in the current period: accelerated depopulation, more specifically, the decline of birth rates and the ageing of the population. In this regard, the links between the article and the current one explain the importance of the study on student cohorts to observe trends. It is clearly observed that there is a motivation for the study of social assistance, but human resources are shrinking. The values and principles of the profession are needed to be studied in order to observe how they stabilize and how they are transimposed into a constantly changing, shrinking demographic society.

Goian (2014) publishes an article focused on how educators and learners identify their needs on the area of individual and personal development, but also on the sphere of psychosocial well-being. The current study and the study of the author are similar, both centered on the profile of people coming from the educational sphere. Also, the profile of students in social work and observing whether they chose the profession after vocation, is related to the study of the author Goian (2010), which provided an overview of how social workers relate to language in the field. Thus, the

students through the undertaken volunteering manage to form skills and abilities and to build a professional identity.

Coman et al., (2025) publishes a study focused on the identity and social belonging of young people. Similarities with the current study appear with the shaping of the professional identity. Just as young people in the study of authors develop their identity through belonging to an online community and a culture of music, social work students develop their identity through civic engagement in volunteering.

Bularca et al., (2022) also looked at how universities in Europe are emphasising the need for sustainability in social networks, online platforms like Facebook and Instagram, and how information reaches students and potential students during the Covid-19 pandemic. As can be seen from the study, most of the students in the 2025 cohort were informed from the social networks of the department or faculty, thus it is confirmed that universities must be more oriented to the sphere of online, visual communication, through social networks, because young generations spend more and more time online.

Bătrânu-Pințea & Coman (2023) focused on how young students form behaviors, habits, values through volunteering experiences. The study is noted for its debated theories, Bandura's Theory, which emphasizes the imitation model of children from adults. Thus, the similarities with the present study are diverse and ample, because, it is confirmed that modelling learning can exist, just as the students from the social assistance specialization perform voluntary actions and become examples for the next generations.

The research assumptions have been validated. The first hypothesis „Students in both cohorts are aged between 18 and 19, indicating a direct transition from high school to university.” clearly shows that the age of students enrolled in the social work specialization falls between 18-19 years, especially those in the 2024 cohort. As for the 2025 cohort, there are also people over the age of 30. It can be seen very clearly that especially the students from the 2024 cohort followed a direct educational route, immediately making the transition from pre-university to university education. At the same time, with the passing of an academic year, the trend is maintained in 2025, but new and diversified age profiles also appear. This denotes that the social assistance specialization is sought also by those who want to pursue university studies at an older age, but also by those who want to rephrase themselves.

The second research hypothesis called „Students in both cohorts has predominantly female” validated because the results show that in the 2024 study cohort, 75 students out of 80 declared themselves female gender, and in the 2025 cohort, 58 students said they are female gender out of the total of 65 students who completed the initial assessment. An overwhelming proportion of the students enrolled in the social assistance specialization are women. It can be said that most specialists who practice as social workers are also female. The gender profile of the students enrolled in social assistance is unbalanced, because the male side is very little present. At the same time, it is assumed that women are more focused on the vocational professions centered on empathy, care and support, given the low number of enrolled male people.

The third hypothesis entitled „Both cohorts of students have prior experience in volunteer activities.” is validated because, both from the 2024 cohort and from the students enrolled in 2025, there are people who have been volunteering. In the 2024 cohort, 21 of the students were involved in volunteering experiences and 35 want to participate during the faculty. In the 2025 cohort, the number of students with experience in volunteering activities increased, respectively 26, and 23 express their desire to participate during the faculty. To better understand the specificity of volunteering activities, they were carried out in hospital, educational institutions, but also through recreational activities, followed by placement centers, centers for disabled people and various non-governmental organizations.

It can be clearly seen that involvement in volunteering activities is a feature easily observed in students enrolled in social assistance. Both cohorts of students have indicated an increased interest in volunteering activities in the social field, both in the past and in the future. This means that in parallel with academic activities, they manifest intrinsic desires and motivations to contribute to the good of society. At the same time, it is clear that personal values are in line with the values of the social worker profession. The areas in which they have already carried out voluntary activities are vast, both general and specific, giving them experience towards social intervention, both at micro, mezo and macro level.

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## **Social Reinsertion And Extraction From The Deviant Environment In The Community Of Beggars In Arad**

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### **Abstract:**

*This paper explores the processes and conditions that affect people who practice begging in Arad. The core of the analysis is the experience of 60 people practicing begging, 154 specialists who are both in the General Directorate of Social Work and Child Protection, The General Directorate of Social Work and the Ministry of Internal Affairs. The analysis was complemented by various statistical data and information available at the level of organizations involved in preventing and combating the phenomenon, such as: 69 documents and 191 case studies. The design of the research is mixed, using both document study, interview guide and sociological inquiry. This study deepens the associated or determinant factors for the deviant behavior of people who practice begging. The findings reveal that the practice of begging and deviant behaviors stem from a complex of social factors. Begging is also a phenomenon that develops gradually. The main factors contributing to the development of begging are: poverty, migration, violent behavior, the environment of origin, the educational level, the consumption of alcohol and prohibited substances. The practical implications are aimed at creating an integrated video monitoring system placed in the City of Arad in order to facilitate the intervention of mobile teams in solving problems. Also, the internal organization of an integrated dispatcher belonging to the local public administration, with a multidisciplinary approach to the operational situation and multi-institutional openness regarding the destination of the captured data. The research is a clear and concise model in the area of changing the legislative framework, with a focus on assessing the mental health of homeless people, persons who practice begging and video monitoring to prevent possible social and community problems.*

**Keywords:** Local police, begging, migration, poverty, social work

### **Introduction**

Begging is a phenomenon widely encountered at the national level, and social reintegration and the extraction of beggars is a complex process, a continuous challenge for social workers and other specialists, because they face resistance to change, dysfunctional family situations and even minors who take on deviant behavior patterns transmits intergenerationally. Begging is generally perceived by citizens as people with their own deviant social norms that lead to isolation and social marginalization. The reality shows that most of them live together in extreme poverty, and their own social identity is marked by social exclusion.

People who practice begging face social problems such as ethnicity, age, financial status, social status, religion, educational level. Bulboaca (2015) believes that the degree of disability is very little recorded in specialized studies, even if it



plays an important role, regardless of whether the person has an innate or acquired disability.

In 2018, a study by the National Institute of Statistics found that 23.5% of the population, and 4.6 million people, were affected by severe poverty, the situation was even worse on the level of age under 18, where the incidence was one-third. Six years later, yesterday's children, today's adults are representatives of the pauper population, being exposed to the pressures of internal and external migration. The main factor is the simulated extreme poverty manifested in its three forms: low income and consumption, lack of housing and poor housing. (Braşoveanu, 2023)

The attitude of the members of society towards beggars cannot be analysed without assessing the more comprehensive attitude towards the social categories affected by poverty. In this position, Szabo & Petrovici (2017) highlights the importance of the proximity of poor areas to areas occupied by administrative or commercial elites relevant to the general population.

Pop (2023) specifies that begging is more prevalent in the case of minors. This way of life is associated with the uprooting of the family (leaving the area of origin, alone or accompanied by close relatives). This aspect, corroborated with the intergenerational transmission of the gain of existence through the practice of begging, makes it difficult for the person to escape from the nets of the phenomenon.

In terms of social involvement, society contributes negatively to the formation of practices through constant pressure on communities that do not possess financial and social resources, the increased difference between the financial income of the company in general and of vulnerable groups, in particular the existence of a real estate not managed by the owner or the state. Real estate that is not in the administration of a natural or legal person becomes a place used by beggars and homeless people, being used for its own purpose, housing (Healy, 2017; Farid et al., 2021; Finzi et al., 2023)

Implementation in Romania, starting with October 1st, 2024, of the Integrated Electronic Monitoring System (SIME) of the suspects, facilitates the approach of the beggar community from the perspective of preventing serious incidents in which they may be involved. The applicability of this legislation to cases of domestic violence, harassment, threat, abuse and imminent risk of aggression covers a large part of the problematic relationships within beggars' micro groups. (Law 217/2003; Art. 208 of the Criminal Code; Art. 206 of the Criminal Code)

One of the conditions for reducing the incidence of begging is to reduce or stabilize the process of generating people with high poverty rates, prone to internal migration. Thus, the institutions must aim to improve the economic and social climate in the areas of origin of poor people. As indicated by the latest edition of the Social Monitor (2018), regional disparities in Romania tend to accentuate, the differences between the highest and the lowest regional average GDP, from 3.2, to, at 3.6 in two decades.

The replication of these conditions denotes an increased risk of applicability in the foreseeable future of the Romanian state. However, it benefits from the advantage of not having to experience the control of the phenomenon of begging, having the opportunity to take over the good practices developed by the Western democracies that have faced in particular, with the consumption of banned

substances among people who are in a high degree of poverty.. (Bowling, 2022; Dewiyanti& Rosmalia)

Owusu-Sekyere et al., (2018) reflect the reluctance of female individuals and their families to publicly expose them by begging as they approach adolescence. The reason lies in the risk of compromising the chances of getting married. The situation contrasts with the high probability that they will be used for begging at the stage of the first childhood and preadolescence when minors are most likely to attract sympathy and generosity of the population.

Edmund (2020) said in Project Syndicate that studies conducted in northern Europe lead to the following idea: a person's financial income is not even a credible indicator of poverty. Real indicators are centred on impossible access to services and food, with basic needs not being met in a prolonged manner. More specifically, the lack of sufficient and healthy food, the impossibility of accessing healthcare and the lack of housing space. These are the main indicators of the level of poverty that correspond to people who practice begging.

Chauhan (2013) focuses his attention on hate messages against beggars and homeless people. In social media and media, stereotypes are transmitted that hide the non-compliant approach of cases requiring specialized help. The press tends to neglect the effects that the increased level of poverty has on the person. In this way, the scale of poverty is diminished. The same effects are presented disproportionately, unrealistically and confusingly in relation to the scale of poverty in the territory of other countries. (Dița & Vîrlan, 2019)

The desire to be sensational transforms the situation of beggars and homeless people into a media trend, without specifying the harmful effects on the person and on the whole society. Moreover, the lack of real involvement in the development of the punctual topics addressed, subsequently leads to deviations in the mass perception related to psychosociology and which determine social problems.. (Sumuko & Mbang, 2023; Arefi, 2022).

The current study aims to provide a real perspective on the experiences experienced by people who practice begging in Arad. At the same time, the study involves professionals in the field of social assistance and specialized bodies who work in local public administration, who come into contact with beggars frequently.

### **Methodology**

The purpose of the research is to multidimensional analysis of the phenomenon of begging in Arad, starting from the favoring causes to the current stage of the phenomenon, continuing with the existing institutional response.

### **Objectives**

O1: Sociodemographic definition of beggars typology and how to survive economically.

O2: Evaluation of the determinants of deviant behavior and the practice of begging.

O3: Analysis of the perception of professionals in the field of prevention and combating the phenomenon of begging with regard to the dynamics and associated risks.

### **Research questions**

Q1: What are the socio-demographic factors that favor the practice of begging and what is the way of survival according to the typology of beggars?

Q2: What are the factors that determine the practice of begging and the presence of deviant behavior?

Q3: What are the perceptions of professionals in the field of prevention and combating the phenomenon of begging with regard to the dynamics and associated risks?

### **Sample and instrument**

In the investigation process, a mixed research method was used. For a structured thematic approach, an analysis of beggars from Arad Municipality was made from a descriptive perspective, followed by an analysis of statistical data and information available at the level of organisations involved in preventing and combating begging. In this respect, there were also involved professionals who work both in the General Directorate of Social Work and Child Protection, the General Directorate of Social Work, as well as in the Ministry of Internal Affairs.

The descriptive analysis came about through the use of internal documents (verbal processes, interviews, statistics) that record the status of persons practicing begging and who are in the attention of the Local Police of Arad. 69 Narrative documents were used that describe in a non-standard way information about the persons investigated. These people are special cases due to the high level of relapse in practicing begging, seniority on the streets or the high risk weight they manifest on themselves. A total of 191 cases (case studies) of begging have also been analysed, representing cases with high potential for recovery, as these activities are not yet defining but only occasional.

On the quantitative side, a survey was conducted with professionals working in the Local Police of Arad, the Social Work Department and the General Directorate of Social Work and Child Protection. The questionnaire was applied on a total of 154 respondents, divided as follows: 94 people with public order attributions and the evidence of people from the Local Police of Arad, Arad, 26 Persons who work in the Child and Family Protection Service in the Social Work Department and 34 persons in the compartments aimed at child protection, protection of persons with disabilities, etc, protection of victims of domestic violence and victims of crime in the General Directorate of Social Work and Child Protection.

In order to achieve the research objectives, a mixed methodological design was used. Sharma et al., (2023) specifies that „mixed methods” is a concept that covers both qualitative and qualitative methods, being an approach focused on the subjective and objective in-depth analysis, in tandem.

Dawadi et al., (2021) believe that the use of multiple research methods could be superior compared to focusing on a single method. The explanation relates to the broad perspective on the phenomenon under investigation, which cannot be highlighted if a single research method, be it qualitative or quantitative, is used.

### **Data collection and processing**

A total of 69 narrative documents were collected describing information about the persons being investigated, namely, beggars. There were analyzed 191 cases of begging, respectively, case studies. The quantitative method involved conducting a sociological survey, the technique used being the opinion survey, and in order to obtain the necessary data for the study, the instrument was the standardized questionnaire.

The same instrument was applied at the level of the Local Police of Arad Municipality and at the level of the partner organizations involved in the management of the phenomenon of begging, namely the Directorate of Social Work and the General Directorate of Social Work and Protection The child's. In this respect, it was aimed at making a comparison on the perception of issues both in the operational field and in the field of prevention.

As regards the concepts and dimensions researched in the quantitative analysis, the following dimensions have been inventoried for the concepts of beggar and beggar:

- Interaction with the beggar in terms of exposure, risk or potential recovery;
  - Assessment of the trends and causes of the phenomenon of begging;
- the role of institutions in managing the phenomenon.

## Results

The research results start from a mixed research to better understand the specifics of the researchers in Arad.

Quantitatively, the research results provide a wide range of information. The phenomenon of begging and vagrancy is predominantly dominated by male individuals who make up 81% of the existing database. 55% of the participants come from Arad County, and the rest from 33 other counties of the country, which indicates that Arad is a destination of beggars migration.

A percentage of 32% of respondents have children, information either declared or verified by the organizations involved. The average number of children is 2.29 with a minimum of 1 child and a maximum of 10. There are also respondents who do not clearly remember the number of children. Regarding the period since he was in Arad, it was determined that the average is 15.48 years, and on the streets I live for 7.69 years.

An analysis of the Pearson correlation between the age of the subjects and the years spent on the streets was conducted. Despite the limitations of the existing data, the correlation is significant of medium and positive power. Thus, the increase in the age of respondents correlates positively with the increase in the years spent on the street. There is a historical phenomenon that accumulates gradually, and punctual situations are not correlated with possible cases that come to live on the streets by chance.

**Table 1.** Pearson Correlation

|        |                               | 7. How many years on the streets? |
|--------|-------------------------------|-----------------------------------|
| 1. Age | Pearson Correlation           | .368*                             |
|        | Significance of the threshold | .011                              |
|        | N                             | 47                                |

Another perspective of the study refers to the professional history and the economic model that ensures the survival of the subjects. 20% of respondents worked and currently 40% work. The activities carried out are not taxed in the field of construction, agriculture, recycling or cleaning around areas or communities that accept and use their services. Daily income is mainly due to the practice of begging which is complemented by non-tax activities or, in fewer cases, various social benefits. In particular, less than 5% had work experience abroad.

For 22% of respondents, daily value and average financial survival was achieved. The average is 84.6 lei per day with a minimum of 10 lei calculated most often on the basis of social assistance and a maximum of 400 lei for those who work in construction and are to some extent qualified.

The overnight zones are diverse and only in 10% of cases we refer to the night shelters provided by the public administration. In general, there are a few central points such as: CFR Train Station area, Motel "Moon with good luck" where they pay daily access based on money earned, abandoned houses or Hotel abandoned "Parc", on banks, on banks, in park.

In 2020, an investigation was carried out into the situation of clandestine settlements on Marului Street. 108 Adults with false homes have been identified. Most of the identified minors lived alongside adults who had their registered residence at addresses in Arad. In 74 makeshift housing containing the 229 identified children, there were 20 employees (most of them, with the minimum wage in the economy), 14 had occasional income, 3 had sickness pension or disability allowance, 3 were at retirement age and 2 went to work abroad.

As for, the link between deviant behavior, in particular, aggressive and homelessness, the results show that 27 % of the cases have a history of violence that consists of relapse or even institutionalization in the Penitentiary; 31% have violent behavior in general (physical and verbal), and 31% they have shown violent behavior in interaction with the Local Police; 11% come from a violent environment or even violent family. Comparative analysis indicates 64% of those who have a form of violence in historically manifest behavior of institutionalization.

Following the Chi2 probabilistic test and obtaining a value of 23,671 corresponding to a statistically significant threshold, we can say that the percentage differences are not random. It is no accident that the proportion of those with forms of violence is higher within those with a history of institutionalization.

**Table 2.** Pearson Chi2

|                                       | Value  | df | Asymptotic<br>significance<br>(2-sided) | Significant<br>threshold (2-<br>bidirectional) | Exactly Sig. (1-<br>unidirectional) |
|---------------------------------------|--------|----|-----------------------------------------|------------------------------------------------|-------------------------------------|
| Pearson Chi <sup>2</sup>              | 23.617 | 1  | .000                                    |                                                |                                     |
| Continuity<br>correction <sup>b</sup> | 22.037 | 1  | .000                                    |                                                |                                     |
| The probability<br>report             | 22.561 | 1  | .000                                    |                                                |                                     |
| Fisher's exact<br>test                |        |    |                                         | .000                                           | .000                                |
| Linear<br>association                 | 23.526 | 1  | .000                                    |                                                |                                     |
| N valid cases                         | 260    |    |                                         |                                                |                                     |

Comparative analysis of forms of violence by type of subject indicates that 54% of those who have some form of violence in behavior come from the high-risk segment. Another correlation identified refers to the total forms of violent behavior and seniority on the streets. Thus, the increase in seniority on the streets positively correlates with the increase in the score of forms of violence. Analysis of forms of exploitation shows that 19 cases have experienced some form of exploitation, such as toxic relationships, slavery or human trafficking. These subjects are part of the case study segment. Analysis of addictions shows that from the base of 260 people, 104 people consume alcohol, 62 prohibited substances and 122 do not have addictions. Regarding the amplitude of the phenomenon of addiction, 11% are dependent on the consumption of prohibited substances and alcohol, respectively 42% have a single addiction. The comparative analysis of the consumption of prohibited substances in relation to the institutionalization history states that the proportion of consumers is higher, respectively, 32.2% in the segment of institutionalized ones than in the segment of non-institutionalized ones (19.4%).

As for the types of drugs used, we can note: rind (70%), aurolac (18%) and ethnobotanicals or marijuana (8%). There are only two cases when taking risk drugs. In the case of poverty, only 11 cases have reached a desperate situation due to the loss of housing or work. The poverty stage in which the subjects are located is due to a social context and the accumulation of poverty compared to the incidence of dramatic situations.

Social alienation affects 40% of the subjects, the most important forms being: school dropout affecting 18.5% of the subjects; family abandonment 16.9% which assumes that the subjects left the family home due to abuse; separation from the family, 9.6% state that they do not keep in touch with family members; 5% entourage entering unhealthy environments that have accelerated the fall; suicide attempts that, although restricted, are, however, present alongside other forms of self-mutilation.

The component of health is essential in the framework of the beggars theme: 39% have some form of medical condition or physical/mental disability. The most common disability is mental (18.5%), generally due to heavy consumption of alcohol and banned substances over long periods of time. Mutilation or self-mutilation are also common in 13.5% of subjects, on par with poor health due to exposure to harmful environmental factors.

There is a positive correlation between the total form of behavior and the total score of addictions, those with multiple forms of violent or historically violent behavior have higher addictive scores; and; between the total forms of behavior and the total score of alienation so that those with multiple forms of violent or historically violent behavior have higher alienation scores. An analysis of the regression between the total forms of behavior and the total score of addictions reveals through ANOVA's test that the model is statistically significant. Addictions contribute to the total form of behavior.

Regarding the risks of interacting with people who practice begging, there are several types. Regarding respondents who work in the Local Police, the risks are higher in terms of health and verbal aggression. As for Social Work respondents, the risks are higher in terms of physical and verbal aggression. If we look at it in parallel, how the Local Police and social workers estimate the recovery of beggars, around 40% think that the majority are irrecoverable. 17.9% of respondents believe that a large proportion could be recoverable.

The most difficult situations for both categories of professionals in relation to the target group refer to: aggressiveness and addictions of the subjects; the influence of alcohol or psychotropic substances; the inclusion of children in begging activity; mental disorders; communication, distrust of communicating with authorities and receiving help; desire to return to old habits; lack of concise normative acts.

As regards the assessed causes of begging, respondents had to rank each case according to their importance. Thus, the lower the average, the higher the hierarchical importance. It can be seen that respondents in the local police prioritize the factor of family breakdown (2,25), and social workers dependence on drugs (1,68) and alcohol (2,32). Although there are observable differences, the ANOVA variation test did not identify significant differences between groups.

Regarding the appreciation of the reasons for which beggars arrive in Arad, all respondents appreciate that the availability of the population is first (100%), followed by the generous offer of housing spaces being appreciated more by social workers (68.1%) than by local police (61.2%). In 3rd place is the low incarceration rate appreciated by 36.2% of social workers and 29.9% of local policemen. The additional reasons mentioned refer to: poverty, proximity to the border and information on opportunities in Arad. From a qualitative point of view, the research results bring significant information. There is a discrepancy between the number of subjects who need preventive, curative and reconstructive intervention and non-

governmental organizations, the material and human resources available to local authorities.

The situation becomes obvious when comparing the human and material resources usable for the intervention of law enforcement and emergency medical teams, in relation to the personnel and logistics of social assistance and general medicine/ambulatory psychiatry that can be used to prevent worsening of the economic, physical and mental state of the research subjects.

*„94 functions of local policemen with public order duties in the field and dispatcher. To them are added another 33 functions from the services of discipline in construction, environmental protection and the bookkeeping of persons, as well, which have a coercive role in the use of different locations for hosting research subjects.” (R1)*

The raids carried out together with the Ministry of Internal Affairs proved the hypothesis that the local police can ensure, at the same time, the takeover and management in their own locations or of the partners, or for 4 people simultaneously, from different areas of the city, at a regular tour, or for 8-10 people, if a large-scale action is organized (often with the participation of the Ministry of Internal Affairs and social work structures).

*„39 doctors, 78 nurses, 21 nurses, 31 stretchers, five medical registrars (and 4 social workers, which is the equivalent of all night shelter staff). They take over the subjects of the research in the situations when they are brought by ambulance and SMURD, sometimes accompanied by police, local police or gendarmerie.” (R2)*

In Arad, the Social Canteen is subordinated to the Municipal Local Council, but there are no day care centers that offer combined services with a focus on satisfying the main needs: food, clothing, medical and psychological counseling, medical and psychological counseling, interaction with other similar subjects, relaxation, legal advice or professional reintegration.

*„4 civil servants of the Social Work Directorate working at the Night Shelter and a total of about 30 social workers who come into contact with beggars, but not permanently, as a result of the exercise of the duties of the service. At the Night Shelter there are 50 permanent places where the beneficiaries of the minimum inclusion income can be accommodated. The number can be supplemented up to 80, during the cold season.” (R3)*

Analysis of interventions by officials paid by the authorities in the public domain, in situations where people practicing begging are involved, it almost invariably reflects the blockage that occurred after the identification made by local police or police crews. The main problems are related to the temporary takeover of the Emergency Unit, followed by physical stabilization, refusal of admission and leaving the hospital unit; stationing those admitted to the psychiatric ward and leaving it after a few hours, without carrying out exhaustive assessments on the degree of deterioration of mental functions; refusal of hosting at the night shelter; refusal of specialized assistance; concealment of financial sources used for daily survival.

Clearly, beggars and homeless people do not want the help of the authorities. Expectations are related to the presence of the staff involved in supporting them, both in the natural living environment, on the public domain, and in the area of the facilities performed to shelter themselves. Only under these conditions can a



maximised availability be obtained to provide solid indications of the conditionings to which they are subject.

In the period 2019-2024, the Local Police of Arad City found the presence of 528 beggars in the city. Of these, 75 were sanctioned more than 10 times (28 are from Arad, 25 from other localities of the county and 23 from other counties of the country). The beggar with the most sanctions received 138 fines in 50 months. A disruption of the applied sanctions caused by the Covid-19 pandemic and the Law no. 61/1991b. During the 50 months analyzed, 177 prostitutes were sanctioned, and 71 of them were fined more than 10 times.

*„Distribution per year of sanctions applied: 650 in 2019, 403 in 2020, 428 in 2021, 1048 in 2022, 807 in 2023 and 253 in 4 months in 2024.” (R4)*

One of the assumptions confirmed by the qualitative analysis is that at least part of the population of beggars and, by extension, the social category of homeless people, they face problems of social and professional integration due to lack of relational and lucrative skills. Regarding drug use, interviews with beggars reflect acceptance of a fairly wide range of reactions at the time of consumption: higher activism useful for begging/group games/imposition in the microgroup, disinhibition, lethargy, sleep.

*„Most often they will figure out after the first fumes of the concentration „tipplei”, which will allow them to temporize a possible occurrence of stupefaction by interrupting or slowing the inhalation.” (R5)*

The interviewed subjects report that in the morning they consume at least one cigarette of „many.”. Against the background of inhalation or ingestion of toxic substances, in the afternoon or early evening, „work day” ends. Most often, subjects retreat to safe areas. In the unfolding of the „work”, people who practice beggary are attentive to the hours of traffic and pedestrian, as the most tendering for the production of public mercy. The decision to bird the area is influenced by the daily schedule and the physical and mental state preceding and subsequent to the consumption of toxic substances.

There have also been cases of members of a family practicing begging. At the same time, there are situations where some family members choose to reintegrate totally or partially, and family relationships do not continue, because integration involves finding a job, which means, in conjunction with the establishment of a host or the abandonment of systematic consumption of toxic substances.

The objectives of the research were achieved, observing on the one hand the socio-demographic factors that contribute to the formation of the typology the persons who practice begging, as well as the preventive, protective factors that can support the process of social reintegration

## Discussions and Conclusions

Otovescu (2013) marks the cultural identity of Romanian immigrants in Europe, developing concepts with international interest, on several spheres: social resinsertion, deviant environment, how it develops and what new peculiarities appear in vulnerable groups with specific on the area of identity transformation in a context of vulnerability. The link between the book and the current study is on the importance of involving institutions in supporting vulnerable groups, in analogy with the community of beggars in Arad, because the extraction from the deviant

environment represents a reintroduction into the community and social environment, which works both for migrants and people who practice begging.

Coman et al., (2025) brings similar results on the area of individual and social identity formation. It is observed both in the study of researchers, but also in the current study that people belonging to a particular group, relate to belonging to a community, to its values and norms. Usually, those who practice beggar need emotional support and have positive behavior patterns for effective social reintegration.

Bătrănu-Pințea & Coman (2023) show important results on the sphere of deviant behaviors, on their formation and maintenance. The present article is related to the destructive behaviors that are learned through observation, so minors who have parents who practice begging will be more likely in the future to practice in their turn once they have noticed and can mimic the deviant behavior. The authors believe that violent environments create dysfunctional behaviors and thus long begging and cohabitation on the street forming a constant behavior of distrust, survival, dependence on substances, alcohol consumption, without a constant readjustment to a formal environment and social norms.

Goian (2020) explains how the social environment becomes an important factor leading to the formation of deviant behavior. The social context in which the child grows and develops, but also the social tension felt, competition lead to aggressive behavior. In the groups of people who practice begging, there are many vulnerable people with their own specificity, but also exploiters, informal leaders who can lead illegal activity from the shadows. The author mentions that multidisciplinary intervention is an important principle both in the sphere of bullying received by students and in the sphere of social reintegration.

Otovescu (2015) presents the phenomenon of social reintegration of people coming from a vulnerable environment and presents the risk factors that produce social isolation, but also the resilience of people and its activation in order to manage to overcome the situation and balance itself. Thus, they are directly related to the strategies that people who practice begging must apply in order to get out of the vicious circle and facilitate social reintegration. The social deviance and the factors that lead to it are presented by the author Adrian Otovescu, as follows: lack of a stable shelter, high level of poverty, insecurity, unemployment, lack of stable incomes, lack or rapid degradation of family and social relations, dependencies, gender inequality and social inequality.

The research highlights that people who practice begging in the City of Arad are 81% male%. A percentage of 55% come from Arad County which denotes that the rest of the people reached this destination from other counties. The average period of stay in the City of Arad is 15.48 years and 7.69 years in relation to the cumulative period on the streets. In terms of family responsibilities, only 32% of respondents have children, with an average of 2.29 children per respondent. Family conditions emphasize the significant correlation between harmful family history and the constant tendency to live on the streets.

However, the main sources of income come from the practice of begging, complemented by the provision of non-taxed work in particular in areas such as agriculture, construction and recycling. The average daily income is 84.6 lei/day and varies between 10-400 lei depending on the organization of the activities carried out.

The previous job and professional experience state that only 20% of respondents had a profession in the past, and 5% worked abroad.

Respondents' experiences highlight the nighting areas, the most common being: motels, train stations, abandoned public spaces. 10% use public shelters. The main problems related to housing are situations where the residence is fake or housing is improvised in public spaces. The deviant behavior of people who practice begging exists and manifests itself through violent behaviors in particular, in interaction with the authorities, at a rate of 31%. The main correlation is related to violence, as being more pronounced in the behavior of previously institutionalized or older people on the street.

However, people who practice beggars face addictions, such as alcohol consumption (104 people), drug use (62 people), and 11% of respondents have multiple addictions. The main substances used for consumption are: „many” (70%) and aurolac (18%). Poverty experienced by respondents is also a main result of the shortcomings encountered during life. In terms of social alienation, 40% have forms such as: school dropout (18.5%) and family abandonment (16.9%). On the medical side, 39% have disabilities or physical/psychiatric disorders. 18.5% are mentally disabled due to drug use.

From the point of view of the results in the qualitative sphere, there is a major discrepancy between the needs manifested by the persons who practice begging and the resources available at the level of the municipality. In Arad, there are no day care centers to provide the necessary support for homeless people.

From the perspective of specialists, both in the field of social work and those who work in the Local Police, 40% believe that people who practice begging in the City of Arad are irrecoverable because of alcohol dependence, drugs and lack of family support. In this respect, the lack of a stable job correlates with the influence of substance use on working capacity and social adaptation. People who practice begging in the City of Arad prefer to maximize their income depending on the hours of pedestrian and auto traffic.

In this respect, the research results reveal a problem present both at national and international level in order to implement strategies to decrease begging and training of specialists intervening on the field.

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## The Reticular Religion Or The Religion Of The Network

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### **Abstract:**

Religion should not be confused or mistaken for theism, pantheism, or other forms of what is called religious faith, such as the belief in gods or God, etc. This phenomenon is rooted in human nature and the need for meaning. According to Jacques Ellul, religion is of a pragmatic nature, being the way through which mankind orients itself in existence. Religion offers a comprehensive interpretation of reality, a map, whose function is not properly intellectual but existential, providing means of orientation in existence. That is why science cannot replace it. It allows man to find himself and to act in the world. It helps to build a community between mankind and the world around it, making it possible for mankind to understand itself and the world. It makes it possible for humanity to better cope with its existential condition. It does have some irrational elements to it, and it might be based on unverifiable beliefs. But here lies one of its functions, namely, to offer certitudes that help man orient himself in the real. Thus, it does offer a view and an explanation of the world. There is no religion without such an explanation (Ellul: 2003: 199). In this paper, I shall describe what might be called the religion of the network.

**Keywords::** *religion; network; technocracy; globalism; managerial society*

### **1. Introduction**

Religion does not equal theism or Christianity. It must not be confused with a particular form of religion or spirituality. Religion, according to Jacques Ellul, can be seen as something which fulfill a pragmatic function. God or the gods are not the central defining elements of it. Religions now and then meet the same function, even when their object has changed. Religions accomplish the role of a guide. They offer orientation and guidance. They have an existential role to play. A lot of things can occupy the central place in what is common called a religion. Even mundane objects or facts can do that. The central religious object of modernity is now different from the central values of ancient and traditional religions. The technical object (and the technique) has now become the receiver of the religious sentiment (Ellul, 2003: 226), and in the same process politics and the state have become also sacralized. And even things and processes used to attack a former religion become religious in themselves, offering new types of religion, political religions that is. The greatest anti-religious actions, despite themselves, lead to new forms of religiosity (Ellul, 2003: 206). And these new religions are most of the time the expression of a technicized society. Dionysian celebration is exactly this. Just as much the show society – *la société du spectacle* – is. The religious feeling infests other objects, and one of those objects is the network.

Religion can take different forms, and one form modern religion has taken is the religion of the network. This is another manifestation of what Henri de Saint Simon called the “industrial religion”, a spiritual configuration centered around the

concept of network. That is why it is called the religion of the network. A new religion was born, the religion of engineers. Nevertheless, this religion has deep roots in the Middle Ages, in the monasteries, which with their workshops and division of labor set up the basis for the modern industrial religion. The network metaphor is not new, but it was revived in modernity. It got a new life that has led to a new conceptualization of reality and society as a network of networks. This religion of networks lies at core of the modern technocratic transformation of man and society. This should not be seen as a surprise, though. The notion of network had connotations that brought it in relation with the original religious meaning of communication/community in a kind of religious meaning, as the way to achieve communion. The present-day form of the reticular utopia is embodied by the internet and the cyberspace. The era of the “industrial religion” has been called by the Russian thinker N.Berdiaev as the era of organization long before Jacques Ellul or Simon Charbonneau began to see in the technical development of modernity the foremost problem of contemporary life.

Berdiaev once remarked that the only true faith modern and contemporary man maintained was the faith in technique, its power, and its endless progress. And this is not a faith without basis. Everything in the world conspires to make this faith and belief system true. The wonders of the technique do not cease to amaze us and take place permanently, now even more so. The technique has acquired a significance that the Christian consciousness did not seem to understand then and does not understand it even now (Berdiaeff, 1933 :10). The attitudes Christians espouse toward technique are two. Like many others, they can consider it to be neutral and think it belongs to the domain of engineers, or they can see it in an apocalyptic manner, as the triumph of the Antichrist. Christianity, but not only, is faced with the reality of modern technique, a new type of reality or of Being, produced by humanity. It is a reality that must be acknowledged as such since it has serious consequences for the world and the very existence of humanity. It ushers in a new relationship mankind with the universe, with nature, and with itself. It gives rise to a new global anxiety. This era gives instrumental reason and its instruments a kind of eschatological power, providing mankind with a technique whose mission seems to be the redemption of mankind by gaining complete domination of the world and nature (Berdiaeff ,1933: 22), including human nature – transhumanism and post-humanism are not far behind.

Technique – but not only technique – has a religious and sacral dimension. Earth becomes a planet/a purely material object, the mystery is gone, a resource and a material to be modeled and worked with. It also gave rise to the philosophy of history, positing man as the primary agent of history, a self-creating being in the process of progress. The relation and the perception of time and space change, and the feeling of power fueled by the technical progress gives man the sentiment of becoming the master of time and space. It creates in mankind the sense of expansion. The new order of organization comes into being, replacing the old order, which still had roots in nature. To understand the predicament in which mankind is caught, the modern technique has to be understood. To understand it, one must examine the relationships it entertains with current society and not its inner features that might be identical to technique even in the older civilizations (Ellul, 2008: 59). The context in which technique operates is important. The modern society and the life of the

individuals are not possible without technique; personal comfort is impossible without it. In older and ancient civilizations, technique did not enjoy this all-encompassing position, even if it was present under the guise of magic. Technique was used in some limited circumstances. The ancient techniques were bound and embedded in a civilization, they were local and not driven by abstraction, taken out of their civilizational context, and universalized to all other societies.

The technique means art and being industrious – *techne*. Or it used to mean. Its meaning is not confined to the material reals as when one speaks of industry or engineering, observes the Russian theologian. The concept of technique applies to a variety of activities and proceedings. There is industrial, military, economic, and so on. There are techniques pertaining to the comfort of life, to communication, dance, sports, spiritual activities – yoga or shamanic techniques of ecstasy, prayer methodologies, ingesting different drugs to attaining mystical experiences, and so on. According to him, a technique is a way to attain something with the minimum of effort (Berdiaeff 1930: 11). Albeit technique and science might be conceived as a fight (against nature and for emancipation), thus, as a goal to be pursued, they pertain to the reals of means, not of ends. Ends and goals belong to the realm of the spirit. Despite this being the case, the means have replaced the ends. Elevating them to this status of ends leads to the falsification of the meaning of life. For some people, technique and science might become the content and meaning of life, becoming, thus, something spiritual. Such a transformations of the means into ends can signal the diminishing of the spirit or even its extinction, a process already taking place on Earth at this hour. The technical instrument is, by its nature, foreign to humanity, to spirit, and meaning. Defining the human being as *homo faber* is a manifestation of this replacement of the ends and goals of life by the means and instruments that should be serving them. This substitution has been later highlighted by J. Ellul in his works on technique and on technical system. The French thinker shows how modern technique neutralizes and replaces values and ends with means. Technical activities are done to achieve things subordinate to the goals set by life; they should be subservient to life, not the other way around. Subjecting life to means and transforming the means into goals is a dangerous falsification, almost a Satanic inversion of things. Even if one agrees with Karl Marx that economy and economic activities are fundamental for society, it does not follow that the life of the community should be reduced to executing those activities. Human existence and culture depend on the technical element, but in the moment this element takes over, as it happened in modernity, society as a whole, the lives of the individuals, and the ways of thinking and doing things change, the culture and the spiritual being brought to the edge of disappearance. The victory of the technical element over the organic one leads human existence in that direction. There are some reactions to it, such as Romanticism. Modernity is the dominion of fabrication/production – to bring forth, *her-stellen* – as opposed to action, which is the domain of the free use of human capacities. Mankind becomes an instrument of production, being the prisoner of the ideology of work, according to Jacques Ellul.



## 2. The Era of Organization

According to Berdiaev, there are three ages of humanity: the organic, the cultural, and the techno-mechanic – the organizational one (or the age of industrialism according to B.Russell). They are ways of being-in-the-world, not chronological eras. What defines them is the spiritual attitude by which mankind considers the world and itself. In the first ages, mankind lived mostly in what God or nature created. In the third age, not so much. She was still tethered to nature, to natural beings, to gardens, etc. The culture was still bound to nature, still full of symbols expressing it, etc. The technique is quite different. It does not symbolize anything, maybe itself and its quest for efficiency. The application of technique creates another reality, parallel and imposed upon nature and culture. Berdiaev describes the new reality of technique by pointing out the difference between an organism and an organization. The organism is something belonging to the natural and cosmic order; it is birthed by it and gives birth, too. The organizational being points to artificiality. An organization is something created or produced by the activity of man. Organization and the actor process of organization are produced by an organizer, who establishes the goals and ends thereof, from outside it. The goal is extrinsic, while the goal present in an organism comes from within it, from its very structure. It is an entelechy, according to the Russian author. A mechanism possesses, therefore, a goal that is not inherent to it. It is a task imposed from outside. Mechanism can model human behavior. It can steer it. A mechanical clock is used to measure time and to determine human behavior. In the moment when human communities began to use mechanical clocks, which possess themselves their own energy source, human behavior was subordinated to the machine. A mechanism possesses a force that can subdue the one who organized and created it. For the most of history, human society saw itself as modeled after the model of natural bodies and according to a transcendent norm, such as the natural law. There is, after all, a tradition of metaphors like the one of the political bodies, which model society and the state according to this image. The ordering of society was supposed to reflect an eternal order. This state of things changed in the 18/19<sup>th</sup> centuries. Society ceased to see itself as embodying an eternal order of things but as something that can be molded according to man's will. Even the idea of this eternal order begun to go away.

Just as the social order was no longer immutable, so was the case for the natural order. The new order of things, revealed both in nature and in society, is the passage from organic life to constructive/constructed life (Berdiaev, 1930: 17). This new age of organization brings to light an inner rupture in life, between concrete existence and abstraction, between spirit and bodily existence. Organization/organizing is, as Jacques Ellul remarks, technique applied to society, to social, administrative, and economic life (Ellul, 2008: 9). In the terms of James Burnham organization is managerial action meaning the process whereby groups and individuals are assigned tasks that they have to accomplish in effectively and economically, by coordination and combining of all their activities with objective determinable ends. It implies standardization, a way to resolve a priori something in a certain way, brushing aside the search for a new solution and making the whole process impersonal. Standardization is, thus, a kind of acquired conditional reflex. When the situation appears – the stimulus-, a certain kind of answer will be produced. It is a kind of programming.

The managerial and organizational science represents an extension of technique to the whole of society, a mechanization thereof. Modern technique represents a departure from the ancient one. The ancient technique was based on tradition, on models that were transmitted, on accumulated experience. The older techniques evolved according to circumstances, they were handed down, they changed very hard and during a long time, they created behaviors that became automatic and were integrated progressively in each new form of technique. Modern technique implies and subordinates science and reflection to its main thrust: increase of power and efficiency. At the same time, it revolutionizes the manners in which things are done. Modern technique has become a self-contained, autonomous reality, which devours everything, which obeys only its own laws, denying in this process tradition altogether. It forms an environment and a dynamic reality grounded on the combination of already existing techniques and it proceeds so rapidly and revolutionarily, making it impossible to integrate older technical traditions. Permanent innovation causes permanent upheaval in the realm of habits (of behavior, thought, etc.). It is a reality that has overcome experience and has subordinated experiment and reason. Science is a force that is subordinated to the technical endeavors of mankind. Modern and contemporary civilization is, according to Ellul, a civilization of means – a state of fact acknowledged by Berdiaev before him, a civilization wherein the means are more important than the goals and the ends they were supposed to help achieve.

### **3. Modern technique**

Modern technique develops in another manner than traditional and ancient technique. It involves science and conscious reflections pertaining to the way to achieve something in the most efficient way. The intervention of consciousness and reason in the technical phenomenon means many things. It implies that an object is produced according to some features chosen consciously, that it has a purpose that has to be achieved efficiently, it means that possibilities not conducive to this goal would be eliminated, etc. It also means that new possibilities are going to be seen and experimented with in the design of a new material object or technique, the conviction is being born that new means and methods can be found, the pragmatic traditions are disturbed, the reason starts to experiment and examine new ways of doing things. The technical operations are diversified and extended, but the reason will start to examine the results and start ascertain everything based on efficiency. The means and methods invented are now scrutinized and selected or rejected based on this new criterion; they are part of a process of conscious reflection. Only the most efficient of them, the most adapted to the task are retained. Since man becomes fully cognizant of this way of achieving an end, this way of proceeding will be extended to all domains wherein the hazard and freedom are still reigning. Modern technique could be described as the concern of many people to search for the most efficient method of doing things (Ellul, 2008: 18-19). It is not the relatively best means that are sought but the absolute best. Most of the time this search is based upon calculus. Thus, the science of conceiving means, of finding the best means, of efficiency is born. The imperative of efficiency is the Alpha and Omega and it spills over in all areas of life. It becomes the highest norm.

The imperative of efficiency is now present on all domains of activity, irrespective of what are those about, for example, the assault in Normandy or committing genocide, sending people in concentration camps, reeducation, space flight, agriculture, industrial production, service industry, brainwashing, publicity, etc. During this development, a new technique emerges: the technique and science of organization, which will be applied also in various domains – corporation, states, groups of people, police, administrations, etc. Mankind itself becomes the object of technoscience. There are techniques applied to man himself – like medicine, psychotherapy, human relations etc., whereby the inner man becomes the domain of external intervention. The technique and science of organization (the management, coaching, etc.) is a technique applied to man. This development did not take place in a void. It is correlated with the apparition of the modern state, a truly self-aware organization, a structure that is a product of technique, too. This new structure is based on the activities of rationalization, of statistics, of building roads and communication ways, of devising new military strategies and techniques, on the birth of economy in the modern sense. It is a political structure grounded on a hierarchical, rational, and unified system undergirded by a communication network. The mechanization of political and social life began then. The unification of the territory of the state, the introduction of the same units of measure, and new rational ways to do the budget and new fiscal policies, the birth of statistics belong to this effort of rationalization. They are the signs that announce the birth of the age of efficiency. Everything here is technical work (Ellul, 2008: 40).

The state itself becomes a problem of technique and starts to take a technocratic approach to everything. And this new orientation of society, which took off in the eighteenth century, comes with other realities one has to contend with, like the breakup of the family, of large groups, with the atomization of society, which becomes more malleable. Without the process of disintegration of the old social order, of communities based on solidarity, there would have been no technical progress possible and no technocratic state. And the individual is now alone in the face of the state. The period between 1750-1880 is one in which the technical intention shines clearly through, being a time in which invention was a daily reality, so to speak. What undergirds this development of the technique (and of the state) is the interest, a notion that should not be taken in an economic or capitalist sense. In the case of the state, to pursue its own interest means, for example, developing juridical, military, and police techniques to protect it from internal or external enemies. Science and arts are protected due to the lust of power, “*par instinct de puissance*” (Ellul, 2008: 51).

Modern technique is not limited by anything as the ancient technique was. It encompasses all domains of life and all activities, be they social or individual. It has caused an endless multiplication and permanent refinement of means. It is an abstract affair, no longer bound to a certain group or localized area. It has known a geographical extension, a process of delocalization that was not accessible to the ancient technique and evolves very quickly. It has become an objective reality, and, irrespective of the environment or country, its spreading and adaptation by different groups leads to the unity of civilizations (Ellul, 2008: 73). It is a rational and artificial reality. It is an artificial environment that reduces, eliminates, and subordinates the natural one. When modern technique penetrates a new environment, it tends to

repeat what happened in Great Britain and France when the modern technical development began. It dislocates the existing social forms, existing norms, moral frameworks, and the social, moral, religious taboos. It desacralizes whatever it touches, and atomizes entire peoples and societies. It destroys human relations and communities, although eventually new communities arise (Ellul, 2008: 115). It changes all elements of civilization and man himself.

#### 4. The network religion

Humanity is confronted with this new reality, produced by mankind during the process of technical evolution. This is a new reality without precedents in nature and history. Art itself creates a new spiritual reality. Art creates many symbolic realities. The new reality produced by the process of technical progress is not symbolic at all. This is a super-physical reality, which changes the way mankind experiences and conceives reality. The cinematography is an example given by Berdiaev. Today, we can speak of the Internet and cyberspace. Technique is more than a tool. Technique creates a kind of cosmos, of universe. It is *cosmo-urgos*. It is a realm of organized bodies, not of organic bodies. It is a new category of Being. Through mankind's action a new kind of Being becomes manifest. This organizational order affects negatively the psycho-spiritual constitution of mankind, making it to lose its soul. It seems to dismantle the heart, to disintegrate it in a pure sensual and pure spiritual one. The age of technique is an age of the spirit, too. This is attested by the religious sense it has acquired. This new age of technique gives the human predicament a spiritual connotation since it requires a strong spirituality and, maybe, it opens the way to a new spiritualization (Berdiaeff, 1933: 28). In a perverse sense, the human spirit can show its supremacy by becoming *cosmo-urgos*. „La technique fait de l'homme un cosmiurge" (Berdiaeff, 1933: 28). Modern technique creates such great power that it can lead to human and life annihilation. Thus, the situation of mankind acquires a spiritual dimension since man's existence, and that of nature as such, depends on the spiritual and moral inner state of mankind. This is clearly a spiritual and religious problem. This places humanity in a situation demanding a new kind of heroism, a heroism needed to take control of technical development and man's urges. And all of this is because man wants to control things through reason (Ellul, 2008: 40).

Technique, among other things, like the State, has become sacred. And the form that this sacred has today is one relating to network structures. The force of the network is a reality. As Pierre Musso found, each industrial revolution in the Western world was accompanied and depended on the building up of large technical networks occupying a vast territory (Musso, 2016: 19). The railways accompanied the first revolution, the electrical grid came about with the second, and with the third, the internet and cyberspace. This third revolution was born from the intersection of communication and information technology and the birth of cybernetics. Major technical complexes were born by combining technical networks with power structures. This third revolution has led to a computerization of society, which represents a further step toward the technical/technological society and economy that is beset with interconnected command, information, and communication networks. Around this complex reality, there are gathered a lot of images, myths, metaphors, fictions, imaginaries. A new kind of divinity has emerged. This divinity is

the network, the cyberspace and internet being its epiphanies. A ubiquitous divinity. Everything is a network or should be made into one. Everyday life consists in the usage of networks. It supposedly gives meaning and direction; identities are built around social networks. Technique, through the network, has reenchanting the world. The Smart City – a prison- can be seen as another epiphany of this divinity. It has become a cult and defines the way power works, too. The network is now omnipresent in every discipline from biology, mathematics, sociology, political, and organizational science.

The internet and its double, the cyberspace, are instantiations of the network. Both are the image of a universal network that connects everyone and everything on Earth. For some people, the internet and cyberspace are the infrastructure of a planetary brain, which would produce a „collective intelligence” (Musso, 2000: 31). A new form of the sacred is, thus, present in the network. As Ellul once observed, mankind cannot accept the technical objects only in their aspect of efficacy. They are invested with religious meaning. The network is the center of a new re-enchantment of the world. Cyberspace and the internet (created as a counterinsurgency tool) lie at the center of it. This is the expression of a great utopian project grounded on technique, in which the network is central. The network can be defined by its function of linking things together and by meta-linking. It is a link of links (earlier forms of the network were the railways, the roads, the telegraph – all epiphanies of this new sacred). The network links two poles that were opposites to each other before they were linked. In its expression as cyberspace, three things are supposed: the network as a generalized interconnection, interlinking different but nevertheless alike places and things – brains and computers. This view surrounding this mythical figure of networking accepts and promotes the of a future hybridization of man and machine, and the assimilation between brain-network-computer. The ideology of the network, of cyberspace, is of the religious kind, a religion of immanence grounded on the internet. Some internet users reported a kind of religious experience the coming into contact with the internet (Musso, 2000: 32).

This new mythology is not so new. It represents the renewal of the network mythology set up in the 19th century by Saint-Simon and his followers, whereby the enchantment of the world shifted from Christianity to industry and technical networks. The cyberspace can be defined as a network of reticular structures which are interlinked among themselves – the so-called planetary brain, collective intelligence, the place for an electronic citizenship, a reality that has been described as a kind of jungle, or even a territory. Even a new kind of public space. It gives rise to a new universal through contact (Musso, 2008: 34). Cyberspace is reducible to the interconnected networks – a space of communication by the interlinking of computers and brains – giving birth to a sensation of encompassing space (Pierre Levy quoted Musso, 2000: 34). This leads to a return to the etymological meaning of „communion” – sharing and pooling (*partager et mis-en-commun*), which is religious. Society even will become or has already become a society of networks. Cyberspace is a territory without history, made out of interlinkages without end. The claimed virtue of cyberspace is the abolition of whatever seems to resist or to encumber, even the territory, albeit a technical network is defined by its relation to the physical territory.

The same structure that underlies the internet and cyberspace can be found in cybernetics. This structure comes from a theory that tries to account for the way

machines and organisms work in a unitary way, based on the idea of a network. This theory proceeds analytically. According to it, everything can be broken down into small parts/pieces that are afterwards interconnected; what interconnects them and make the things works is the network. When those parts are linked, they give birth to a totality that can be expanded. By repeatedly interconnecting things, the structure of the planetary brain is constructed. The basis metaphor or model underlying all this view is that the brain works as a computer and that the computer works and functions as a brain. A tautological point of view. Both the brain and the computer are organized on networks. Thus, brains and computers can be interconnected through a planetary network to form collective intelligence. The network representation is older than its modern usages since the human body and the network have been associated from the begin of medicine. The body was seen as a network, as a connection of flux and tissues. Even Galen spoke of the brain as a net (Musso, 2000: 37).

Though the idea of network was rooted in nature, in the human body, it gradually loses its naturalness. The nervous system and the brain are parts of the body and can be found in nature. Around 1800, when the medical clinic was born, something shifted in the understanding of what a network is. A network is no longer seen as something given in nature. The network becomes a construct, an artefact. It becomes an autonomous technique, independent of the body. From a natural reality, it becomes a constructed one, from a tool it becomes a machine. The engineers take over from the doctors. From there on the network will be constructed and used by engineers.

The network as a construct can be found in the work of Claude de Saint Simon and his followers. According to him, societies can be described as a military-feudal system or as an industrial system. The first type of society is one identified with a network of surveillance, the second one with a network that allows circulation and communication. There are three types of networks. The type of network that allows the free flow of the flux is an organized network, making the existence of organized bodies possible. It is modelled after hydraulic circulation. The other type of body and network, Saint-Simon calls brute body and networks that retains solids. These two types of networks build a contradiction and could be find in any body. It suffices for a body that an element changes or is misplaced and the flow is blocked causing it to wither and die (Musso, 2000: 47). A crystal is a type of network, but so is an organism. There are also hybrids. The network is very malleable, shows plasticity and can take many forms; a state, the opposing state, and a hybrid thereof. This logic of the network is the basis of Saint-Simon's new industrial religion, which is applied to society. Money becomes here the blood of it, and the circulation of money is equated with the circulation of blood. The continued existence of society depends, thus, on the circulation of this blood. To establish and unmediated circulation of money means to transform society into something like a human body. The free circulation is the basis of the health of a human body and /or society/state (Musso, 2000: 48). Just as a mere change in a body can transform it into a fluid structure, a mere change in the state can modify everything. How? By favorizing the circulation of money in society! The state might become an "industrial system" instead of staying a feudal one. To establish the industrial system becomes a kind of religious work – the task of the "New Christianity". Though the network acquires such an emancipatory,

redemptive value, I can convey other meanings like that of surveillance and control, even if it symbolizes continuity and circulation; as such it can symbolize its contrary (Musso, 2000: 48). For Saint-Simon the enterprise and the workshop are the source of a new morality and of the principle that should organize society. The communion of all the people is no longer realized in the divine liturgy but in all the associated workers in the world who try to impose a huge communication network on the whole planet to make it fruitful. Earth can be remolded through work in a giant ideal organism/organization made of artificial networks that transform it. The network unifies three elements proper to the Saint-Simonian religion: association, communication, and communion. The network becomes the symbol of universal association. Saint-Simon and his followers birthed the cult of the network, which is now taken over by the cultist of the internet, cyberspace, or the supporters of the network society/collective intelligence. By the means of the network, a particular society first and then the world should become an association of brothers. The first place where this utopia should have taken place was around the Mediterranean Sea. Through the development of different means of communication – transport or otherwise – the difference between the West and the East could be abolished (Musso, 2000:49). Networks unite spirits and flesh, man and woman, the West and the East. The network is the place of transmutations between spirits and flesh. It is a religion of networks, be they material as means of communication or spiritual, credit baking networks. The network is both a technique and a political-operator, an instrument of promoting transition and transformation. It produces social change by itself, at least, according to Michel Chevalier. By itself, the network makes possible communication, communion, and democratization through the act of free travel of people. It allows the creation of means of transportation – like the railway – which democratizes travelling. By its existence, by making people belonging to different social classes to travel in common, the railway networks would lead to the abolition of the difference between different classes of people. The railway network reduces social distance, too. The network embodies a policy of general exchange, too, that, due, to its internal architecture facilitates social changes (Musso, 2016b: 37). It became both a technology of the mind and techno-messianism.

The network is not just a concept but a symbol that is surrounded by a certain imaginary. There are three types of networks that structure the imaginary surrounding the idea of communication: the radio diffusion network, the telephone, and the information network. The model of network based on the informatics and the telephone is considered to have an egalitarian outlook, an interactive one opposed to a hierarchical one (which the radio or TV exemplify). All three types embed and express a certain view on society (Musso, 2000: 40). The internet is a model of the free and egalitarian connection. Cyberspace leads to the concrete realization of equality of all participants by getting rid of the pyramidal and hierarchical structures. The cyberspace apparently dissolves the bindings to a territory or to the body, one's memory and the state, and, hence, some forms of identity. Even politics will disappear, and society will consist of networks, which will build meta-networks. Society will become a flux. During this process, the national, and sovereign state will disappear. Pushing society in this direction is, therefore, leading it to a place where identity, history and culture no longer count and would be annihilated. The normal social and political structures would be replaced with a technocracy whose role

would be to allow the flux to flow without hindrance. According to this view, the network is by its very essence anti-hierarchical, being considered synonymous with self-organization and equality. It is supposed to be the concrete incarnation of the utopia of “liberty, fraternity, equality.” One could say the cyberspace is the incarnation of ideals that structure modernity. Networks mediate between present and future (Musso, 2000: 43-44).

## 5. Conclusion

The redemptive force of the network was already present by Saint Simon and his followers, as already seen. The network has become the symbol of universal association and communion, of equality and fraternity. By its nature, it produces democracy, wealth, and freedom. By expanding the network on the whole Earth – first around the Mediterranean Sea – by means of the telegraph, banking, and railways, this dream of unity and fraternity would come true. By implementing and expanding the technical networks (telegraph, railways, etc.) the whole Earth can be interlocked. It is a kind of divine work. Promoting the networking of the world, means promoting a divine work. The further development of these structures is a true act of love for Earth (Musso 2000: 50). The meta-network of the internet takes over the same connotations of equality, fraternity, well-being, democracy, free circulation. The network fulfills the role of Christ being at the same time a symbol for flow, transition, change, being a fetishization of those; the real existing internet and its infrastructure embed all these meanings. It is a temple of the communicational religion, being a reality that points toward an immanent future. It mediates the entrance in the Paradise of the information and industrial society. The truth behind the present-day world is the network, the web of webs and the flow. Social change takes place at every moment. Everyone becomes a transience by being plugged into the network. The technical utopia accomplishes social change by itself.

The network is, hence, a fetishized concept, conceived to think about social change in a certain manner. A result of this fetishization is that it has made it impossible to think about social change since it is believed that the society of networks produces as such social change, without a conscious intervention. It is a concept that carries a techno-messianic baggage. As a concept, the network functions as a “technology of the mind”, which means a kind of canonical thought process by which engineers and industrialists “theorize their design, construction and regulation practices in relation to territorial technical macro-networks” (Musso, 2016b: 38). It induces the same way of seeing things in the people who adopt it. This thought and reasoning pattern carries all techno-messianic signification of the network, which is bound to its theoretical voidness and loss of any kind of symbolic references despite its roots in the imagery of the body. This network ideology when applied and leads to a way of molding it after another structure of networks of networks – the organization as a type of cybernetic machine based on efficiency. The employment of the concept is justified by using organic images of it, artificial networks being compared or identified with the body. It is used as a lever and justification for social and political transformations. The managerial science uses it, since organizations are seen as networks, offering approaches supposed to make them evolve or to become more efficient. Every time when a new type of overreaching network is established – telegraph, telephone and now the internet and cyberspace – the discourse that



accompanies it presents the respective network as a mean to renew society, to produce wealth, equality, etc. It is a messianic discourse, which states that it is necessary to remodel and reorder it according to the network that is taken as supreme criteria.

By linking the network to body image and the brain, the technique becomes naturalized; its artificial character fades away from consciousness. Thus, claims can be made that consider communication networks to be intelligent, or that they constitute an organism, and that by interconnecting them, a kind of collective intelligence would be brought about. Every time a new network comes into being, it will be celebrated as being “alive” and “revolutionary”. Besides, the network has the capacity to be formalized, opening the way toward the mathematization of society. In practice, when a society is configured according to the network ideology, it will undergo, at first, a process of fragmentation. In the new society everything would become interconnected. It changes the relation with the territory, with time, too. The distances become shorter, sometime abolishes it, reduced time, communication, and the flux tends to become instantaneous. The network becomes a tool of planning and developing territory. It makes possible to redefine the way of doing politics by shifting its object from the proper political plane to the technical one. Policy making is no longer politics proper but a technocratic decision. According to Marshall McLuhan electrical network constitutes the nerve system of a society, hence, one could affirm that the extension of the technical network and of the biological one would merge both (Musso, 2016b: 45). Technical networks are the nervous system of a society. This relates to a cybernetic interpretation of life, of identifying organisms and machines as structure defined by feedback loop. The network is essential to this interpretation of society and the world. In the concept of network lies the idea of mediation, in this case between technique and society- be it only because its connection with the body and the old metaphor of the body politic. The network is a technical network, an organizational one, and the lane of transition between those. Society would be transformed as a whole, losing its hierarchical structure, becoming like any organization within a network of networks – resembling the structure of the brain. Just as the companies would be run by a reticular management, so would be the state or whatever it becomes. Societies and the still existing states would be governed by reticular management, which theoretically is opposed to a hierarchical structure. But this new way of governing society presupposes first the dissolution and fragmentation of it in “clouds of sociality” and afterward the reconstruction in “intersections”, wherein “each of us lives,” in the words of J.F. Lyotard (quoted in Musso, 2016b: 52).

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## **Demographically Relevant Pressure Directions In Harghita And Covasna. The Resurgence Of Hungarian Biopolitics In The Center Of Romania And The New Ethnopolitics (Part One)**

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### ***Abstract:***

The present paper aims to examine the pressures faced by Romanian and Hungarian communities in their mutual relations in the Harghita-Covasna area and their impact on the demographic situation. We will highlight the sociological (stigma) and geopolitical criteria expressed in the ethnopolitical concept used by the Hungarian state in its policy in the area, seeking to observe and assess their effectiveness.

**Keywords:** *demographic success, biopolitics, ethnopolitics, Transylvania;*

### **1. Brief introduction. purpose of the paper and conceptual clarifications**

This article seeks to outline the relationship between geopolitics – in its ethnopolitical aspect – and the demographic phenomenon in the counties of Harghita and Covasna. It focuses on the economic, cultural, and administrative policies run (mostly) by the Hungarian state, especially on their financial import, which varies according to which ethnic group is targeted – and how they affect the demography of Hungarian and Romanian communities in two counties. These policies are based on a particular geopolitical concept: the "geopolitics of the Carpathian Basin". Unlike traditional Hungarian biopolitics of the 1930s, this approach now involves financial support from Bucharest. Ethnopolitics, a branch of geopolitics, works to strengthen and expand statehood by supporting the ethnic group that legitimizes it. We will clarify the difference between biopolitics and ethnopolitics using the theories we analyzed and our own research.

Thus, in order to understand what is happening in the two counties, we will attach demography – the science of population, ethnopolitics, more precisely, to Hungarian biopolitics. This approach allows to consider the visible/probable kinetics that come conjoined to government funding. Such dynamics can encourage or discourage cultural, economic, and administrative processes and phenomena, depending on the budgets allocated, which, in the medium and long term, can have implications for demographics. Hungarian officials believe that they could even halt the demographic decline of the Hungarian population. However, we cannot ignore the fact that funding policies, both from Budapest and even from Bucharest, constitute primarily a source of pressure on the two communities. This pressure produces different effects on the ethnic communities affected by it. It leads to the weakening of

the Romanian community, engendering a behavior of abandonment on the side of Romanians, while, at the same time, the strengthening of the Hungarian-speaking population's presence in the Carpathians.

Beyond the specific features of each context, the literature on Romanian communities subjected to politico-institutional pressures shows that stigmatization, restricted access to resources, and identity insecurity can accelerate patterns of withdrawal, migration, and abandonment (Otovescu, Păsătoiu & Cioacă, 2020).

To gain the sought understanding of the relationship between geopolitics/ethnopolitics and demographics, it is necessary to monitor the effects of administration on the population of Harghita and Covasna, and to examine them. In this context, administration is defined as being the result of three factors. These are: a local administration based on ethnic criteria, the Hungarian geopolitics of the "Carpathian Basin", and last but not least, a Romanian administration that continuously refuses to exert its constitutional prerogatives. All three are sources of pressure and tension that impinge upon the local communities, the result thereof being an ideological division (for now) between the Hungarian and Romanian communities, with the former becoming the dominant majority and the latter a dominated, discriminated local minority (Baltasiu, Săpunaru and Bulumac, 2013).

## **2. Biopolitics yesterday and today**

The issue of the relationship between power and the demographics of a precisely circumscribed geography is not new, having been theorized by Kjellen as early as 1917 (Kjellen, 1953, p. 3, apud Bădescu and Mihăilescu, 2003, p. 16). The theory was further developed and reconfigured by Andrei Korponay and Paul Vida during the interwar period. They wrote two works that provided the foundation for the "new science" of biopolitics, with significant titles: *Husz millió Magyar* (We Need 20 Million Hungarians), published in 1941 by Magyar Nemzetbiológiai Intézet (Hungarian Institute of Ethnic Policy), and *Magyar Kárpátmedencét* (The Carpathian Basin Must Be Inhabited by Hungarians), published in September 1941 in the magazine *Kárpátmedence* (The Carpathian Basin).

Biopolitics, Korponay argues, seeks to achieve the "healthy multiplication" (Korponay apud Golopenția, 1942, p. 27) of the Hungarian people, meaning a process of ethnic reproduction, "without mixing", "for can we imagine that Transylvania or the southern territories will remain ours again, as long as the Romanian and South Slavic peoples maintain their current advantage?" (Ibidem, p. 32). According to the Hungarian author, biopolitics is best suited to explain the dismantling of Hungary in 1919 and, since it has identified the true cause thereof, can be used to turn back the wheel of history'.

Karponay argues that biopolitics must become state policy: "The fundamental condition for Hungarian revival, for the new ascendancy of the Hungarian people, is 'the ruthless elimination of population policy based on the chimera of assimilation and the foundation of Hungary's future on the numerical strengthening of ethnic Hungarians: accepting the Hungarian biopolitical idea as a state program'" (Korponay apud Golopenția, 2001, p. 586). In other words, the essence of Hungarian biopolitics is to strengthen Hungarian demographics by shifting the emphasis from the assimilation of other ethnic groups to "Hungarian ethnic reproduction", as specialists

such as Csata Istvan, Kiss Tamas, Szilagyi Sandor (\*\*\*, *Demographic Perspectives...*, p. 46 and passim), etc.

Korponayi argues that all 20 million Hungarians, which existed in his times, must populate... the Danube Basin, including the Carpathian Basin. To achieve this biopolitics desiderate, Korponyai calls for the acceptance of the biopolitical idea as a state program" (Korponay apud Golopenția, 1942, pp. 19-35, apud Didă, 2015, pp. 9-10). The Romanian sociologist Anton Golopenția "translates" this biopolitical project into demographic language, showing that Korponay's desired increase in the Hungarian population means achieving a natural growth rate of 18 per thousand, equivalent to a birth rate of 32 per thousand, i.e. at least six children per family. This plan is, of course, a utopia, but this does not prevent Paul Vida from taking it up and "improving" it. In his work *Magyar Karpatmedencet*, he proposes the occupation of the Carpathian Basin by ethnic Hungarians. The idea is stated directly at the beginning of the work, followed by several proposals for achieving this goal. Vida speaks of the "natural assimilation" of non-Hungarian elements, with "newcomers" to be considered as legitimate as ethnic Hungarians; He also talks about the need to repatriate Hungarians from Europe and other parts of the world, as well as bringing in populations related to the Hungarians from their whereabouts in the Asian heathlands (Didă, 2015, pp. 9-10).

Golopenția's conclusion is that all these utopian plans actually reveal "the fundamental difficulty of Hungarian political aspirations. The claim to rule all the territories that belonged to Hungary in the former Austro-Hungarian Empire is not upheld by the social realities of the present" (Ibidem). Since the demographic growth envisaged cannot be achieved, if Hungary persists in applying this biopolitics, it will only achieve demographic growth "on credit": by resuming the old policies of assimilation, colonization, or repatriation of Hungarians (Golopenția, 1942, p. 35).

The year 2018 was proclaimed by officials in Budapest as the "Year of Hungarian Families," with subprojects such as "The Umbilical Cord" and "Baby Obligations," with investments in education, childbirth, health, economic activities, etc. (Hirado, 2018).

Apparently, the new Hungarian demographic policy does not have the supremacist component of Horthy's biopolitics, although the school curriculum and cultural projects supported by the government suggest otherwise, and the provisions of the new Administrative Code, which the Hungarian Democratic Union of Romania insisted on so much, confirm this.

### **3. The new Hungarian ethnopolitics**

If biopolitics represents a state's pursuit of projecting its power outside its border by supporting the demographics of its own ethnic group on the territory of other states and forcibly assimilating other peoples, ethnopolitics offers a more subtle approach, in the sense that it considers demographic policies to which cultural policies are added restricting other populations development and rights in this process, while its own ethnicity becomes overrepresented in terms of identity and culture. In order to successfully practice ethnopolitics, co-sovereignty is required, namely the de-sovereignization of the legitimate state power on the territory targeted by the expansionist (aggressor) state (Baltasiu, 2022). Ethnopolitics represents a

partial return to the techniques of forced assimilation from the period of Austro-Hungarian dualism, with the caveat that the "forced" aspect is less evident: by making the administrative, intellectual, and law enforcement elites mentally and spiritually dependent on the expansionist center, assimilation no longer appears to be forced, but is part of a large-scale operation to stigmatize the feeling of belonging to the legitimate state and one's own country (today, it is not good in Transylvania to show yourself as Romanian, but there is no problem in being a Transylvanian nationalist or displaying symbols of Hungarian oppression, even if they are fascist ones).

According to statements made by its own officials (Potápi, 2019), the Hungarian state has been systematically pursuing an ethnopolitical agenda for around 10 years, with a threefold objective:

1. Preserving the Hungarian community by halting demographic decline by 2030, a government objective initiated in 2011. In this regard, the Hungarian government is taking measures that far exceed in complexity, scope, and subtlety not only the actions of the Romanian government in this area, but also the paradigm of raising the issue at the level of "Romanian civil society," which is in a curious extended vacation regarding demographic collapse. Thus, Hungary is taking economic, cultural, and social assistance measures in favor of the social unity that is the family, including the informational one, all within the Hungarian geopolitical perspective of the Carpathian Basin. Árpád János Potápi, the Hungarian government's secretary of state responsible for national policy, recently stated: "The Hungarian government has been working for over eight years to support families and encourage young people to become parents, explained Árpád János Potápi and the positive signs are already beginning to show. If we can continue on this path, we hope that by 2030 the demographic decline will stop and there will then be an upward trend" (Ibidem).

2. The instrumentalization of the Hungarian community as a factor in geopolitical construction by treating it as an "invented community" – an aspect discussed elsewhere (Baltasiu, Săpunaru, and Bulumac, 2013).

3. Blocking the return of the Romanian element to the area by practicing the administrative medievalism of the "three privileged nations" in Transylvania, which excluded the Romanian factor as an element with equal rights. We are referring to the demographics of local government, which is predominantly non-Romanian, an aspect exacerbated by the provisions of the new Administrative Code. Experts in local public administration in Harghita-Covasna pointed out in 2018 that: "There are currently dozens of public institutions where no Romanians are employed (and never will be). Town halls, schools, cultural centers, etc., all without a single Romanian employee. This situation has been made possible mainly by Article 108 of Law No. 188/1999, which states that 'In administrative-territorial units where persons belonging to a national minority account for more than 20% of the population, some civil servants in services that have direct contact with citizens shall also know the language of the national minority in question'" (Tanasă, 2018).

Last but not least, analysis of the figures reveals the strange situation whereby the Romanian state's financial efforts in the two counties are subordinate to... precisely this foreign and hostile geopolitical project.

#### **4. Demographic alarm factors in Romania**

From a demographic point of view, Romania has faced a progressive decline due to the following factors: massive emigration, a very high number of abortions, declining birth and marriage rates, an increasing number of deaths, and demographic aging. Of these, emigration and abortions are the two factors that have the greatest influence on the community. According to official figures, there are approximately five million Romanians living outside Romania's borders (Digi 24, 2019), but according to unofficial figures provided by various organizations of Romanians working abroad, the Romanian diaspora numbers approximately seven million Romanians (Caleap, 2018). Worth considering is the intention to return of those who left, which according to Cezar Caleap is less than 10% (Dan, 2018). A United Nations report shows that between 2000 and 2015, Romania had the highest growth in the diaspora worldwide, if we do not consider Syria, our country being second in a global migration ranking, after Syria, a country ravaged by civil war (Realitatea, 2017). According to official figures, in 2017, the intensity of emigration was one Romanian every three minutes, with an average of 600 Romanians per day (Iosip, 2019). These figures are all the more significant given that the largest number of those leaving are in the 20-29 and 30-39 age groups (Cuzub, 2018), i.e., people who make up a large part of the workforce, but also the most fertile age groups. In absolute terms, the counties that lost the most inhabitants were: Bucharest – almost 90,000 people, followed by the counties of Bacău – 78,155 people, Suceava – over 70,000, and Neamț – almost 70,000 (Bechir, 2016).

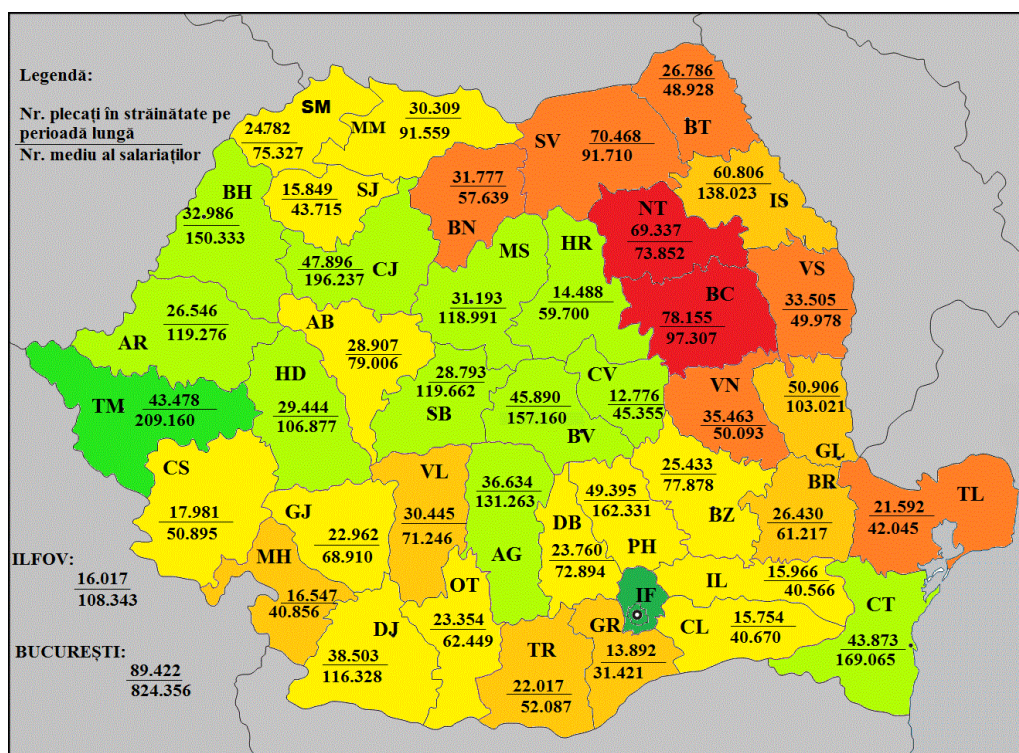


**Figure 1.** Map of emigration by county (2016) (Ibidem)

We note that the two counties, Harghita and Covasna, have relatively low emigration rates, with the ratio between those who left and those who remained employed ranging between 28.16% (Covasna) and 24.26% (Harghita) (Ibidem), while the highest rates at the national level are found in Neamț (93.88% ratio of those who left/employees) and Bacău (80.31%). Overall, the population of Harghita and Covasna seems relatively more settled in the territory, but if we could extrapolate the results of repeated research conducted by CESPE in Toplița between 2012 and 2013, we could infer that more than half of the Romanian population is affected by emigration (European Center for Ethnic Studies of the Romanian Academy, 2013, p. 11), in the sense that there are many families affected by the departure of members. Older Hungarian quantitative studies show that the Romanian population has a migration coefficient twice as high as that of the Hungarian population (Csata and Kiss, n.d., p. 43). It follows that, in terms of actual emigration and the desire to emigrate, the Hungarian population seems much more settled than the Romanian population.

Along with the mass emigration of people of working age, another factor contributing to Romania's demographic decline is abortion: "Data published in 2012 by the World Health Organization show that Romania has the highest abortion rate in Europe: 480 abortions per 1,000 births, which means that almost half of all conceived children are aborted, a rate more than twice the European Union average" (Mediafax, 2016). According to the Ministry of Health's Center for Calculation, Health Statistics, and Documentation, it is estimated that between 1958 and 2008, 22,178,906 children were aborted in Romania (Bălan, 2018), which means that over a period of 50 years, the number of abortions exceeded the current population of the country: on January



1, 2019, Romania's population was 22,171,000 people (National Institute of Statistics, 2019). Under these circumstances, according to the president of the National Institute of Statistics, in the next 30-40 years, Romania's population is likely to reach 14-15 million inhabitants (Economica, 2016), of which only two million will be children (Constantin and Cochină, 2003). By county, the evolution of the birth rate over the last 20 years, presented by econcontext.ro, shows that the birth rate has declined even in Moldova, where the birth rate was the highest (Jurnalul, 2011):

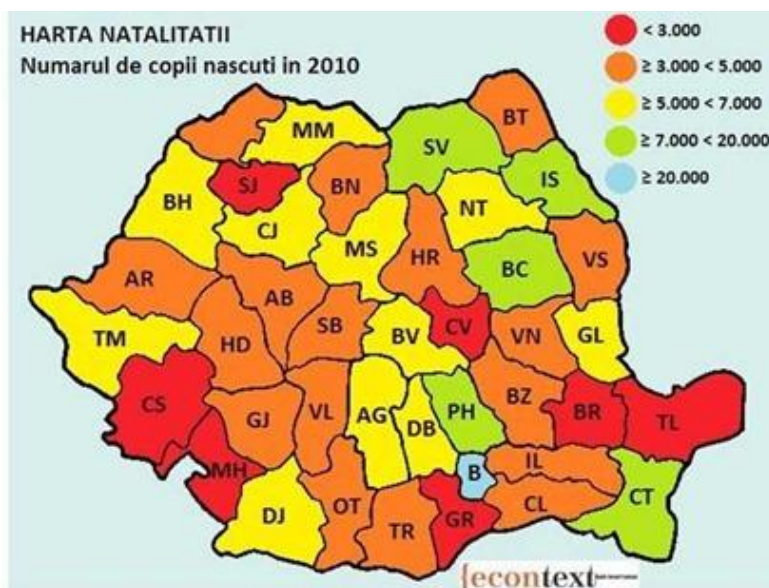


**Figure 2.** Birth rate trends between 2000 and 2010 (Ibidem)

According to the 1992 census, there were 1,624,959 Hungarians in Romania, representing 7.1% of the total population, which at that time stood at 22,810,035 (National Institute of Statistics, n.d.). The number of ethnic Hungarians in Romania reached 1,431,807 in 2002 (6.6% of the country's population) (National Institute of Statistics, 2002), in 2011 to 1,227,623 people (6.1% of the country's population) (National Institute of Statistics, 2011), and in 2021 to 1,002,151 (6% of the country's population) (National Institute of Statistics, 2021). Most Hungarians live in the northwestern region of Romania, in Transylvania, and form the absolute majority in Harghita (85%) and Covasna (75%) (Corbii Albi, n.d.).

Even though they are less affected by emigration, Harghita and Covasna are strongly affected by the decline in birth rates. The actions of the Orban government in Hungary have failed to halt the decline of the Hungarian population in Transylvania, which has seen the following dynamics: it fell by 16% in 2021 compared to 2011, while until its establishment in 2010, it fell by 14% between 2002 and 2011. If we take 1930 as a benchmark, the Romanian population of the current Covasna county had grown by 40.6% in 2021, while the Hungarian population had grown by 14%. Compared to 1930: the Romanian population in the Harghita county area had grown by 34% in 2021, while the Hungarian population had grown by 7%, while in Mureș, the Romanian population had grown by 36% in 2021, and the Hungarian population had decreased by 6.8%. If we take Viktor Orban's assertive rise to power in Budapest



(2010) as a benchmark, in Covasna, the Romanian population fell by 8% in 2021, while between 2001 and 2011 it fell by 14%; Hungarians decreased by 14% in 2021 compared to 2010, while between 2011 and 2001 they decreased by 11.7%. In Harghita, the Romanian population decreased by 22.5% between 2011 and 2021 and by 26.7% between 2001 and 2011, while the Hungarian population decreased by 11.8% between 2011 and 2021 and by 8.46% between 2011 and 2001. During the nationalist Orban government, Hungarians have higher rates of population decline.

Although the Orban government has been running aggressive propaganda and support programs based on ethnic criteria since 2010 – aimed exclusively at the Hungarian/ Hungarianized population (the Székelys), amounting to over one billion euros (Investigative Report, 2020) – the local population continues to decline of its own accord (abortions). Thus, until recently, the two counties had among the lowest birth rates and, at the same time, were among the highest in the country in terms of abortions. In 2010, 55 out of every 100 babies were aborted, with Covasna being the county with the highest abortion rate in the country (1,270 per 1,000 live births, compared to the national average of 574) (Ziare, 2010). In 2015, Harghita County also recorded an abortion rate of 500 per 1,000 births (Harghita Public Health Directorate, 2018, p. 14), above the national average of 480 abortions per 1,000 births (Mediafax, 2016). In 2024, 30,000 children were aborted in Romania, representing a rate of 6.5 per thousand, while in Hungary the rate was 9.2 (Popa, 2025). Other data show that in Romania the abortion rate was 228 per thousand live births, while the abortion rate in Harghita was 22% above the national average (278 per thousand live births), and in Covasna 38% above the national average (314 per thousand live births). In 2025, the abortion rate in Bucharest was 5.1 per 1,000 women of childbearing age (300 per 1,000 births), while in Covasna it almost doubled, reaching 488 per 1,000 births (Dan, 2025). However, there is a consequence of these policies: the abortion rate has fallen significantly in relation to births in both Covasna and Harghita, with the difference between them being marginal in Covasna in 2024 (40 per thousand abortions compared to 39 per thousand births, down from 149/57 in 2010), while in Harghita, in 2024, we already have a higher birth rate than abortion rate – 26/39, much better than in 2010, when we had 66 abortions per thousand compared to 53 per thousand births. From this point of view, the efforts of the Orban government have been successful. On the other hand, compared to the situation in Romania, the absolute data show us:

➤ In 2010:

- Romania: 101,915 abortions to 212,199 births, a ratio of 0.48
- Covasna: 2,611 abortions to 2,468 births, a ratio of 1.05 – more than twice as many abortions as births
- Harghita: 1,930 abortions to 3,542 births, a ratio of 0.54

➤ In 2024:

- Romania: 29,697 abortions to 148,916 births, a ratio of 0.19
- Covasna: 693 abortions to 1,671 births, a ratio of 0.41
- Harghita: 770 abortions to 2,624 births, a ratio of 0.29

All this shows that in 2024, compared to 2010, the aggressive decline in the population of Covasna caused by abortion was stopped, and Harghita approached the national average, but the downward trend in abortions compared to the number of births is general throughout Romania.

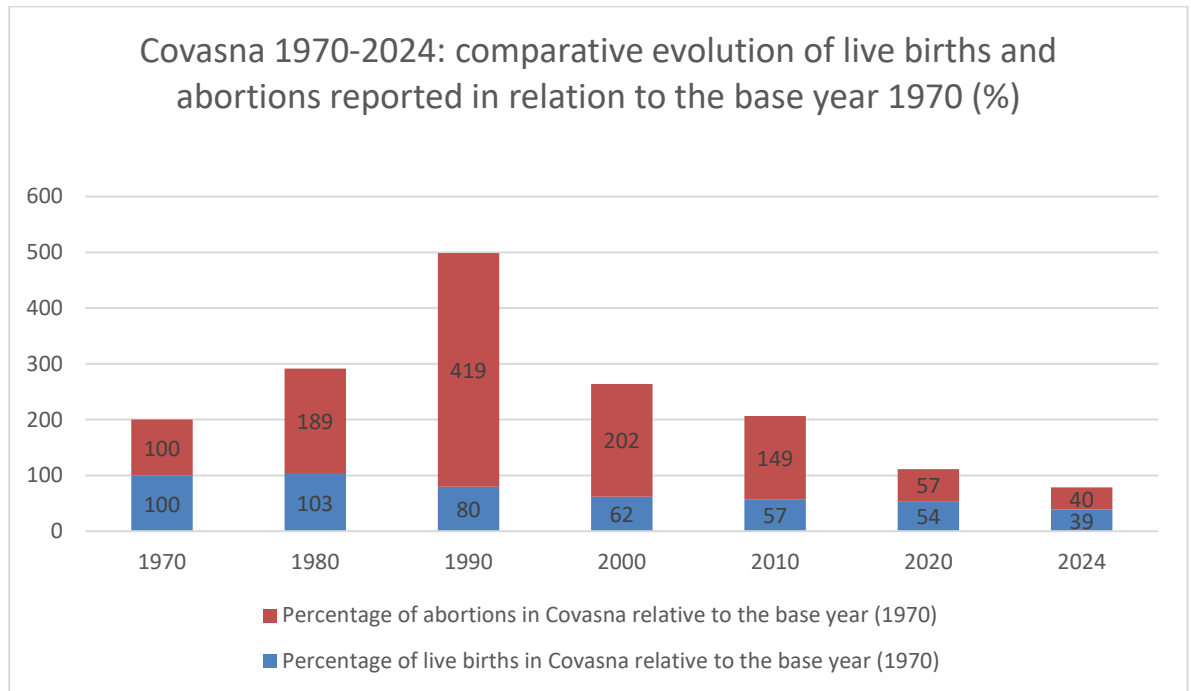


**Figure 3.** Covasna 1970-2024: comparative evolution of live births and abortions (Johnston, 2025).

We clearly observe that abortions are more prevalent than births in Covasna, even though they have decreased significantly in the last 10 years, while in Harghita births outnumber abortions per thousand inhabitants.

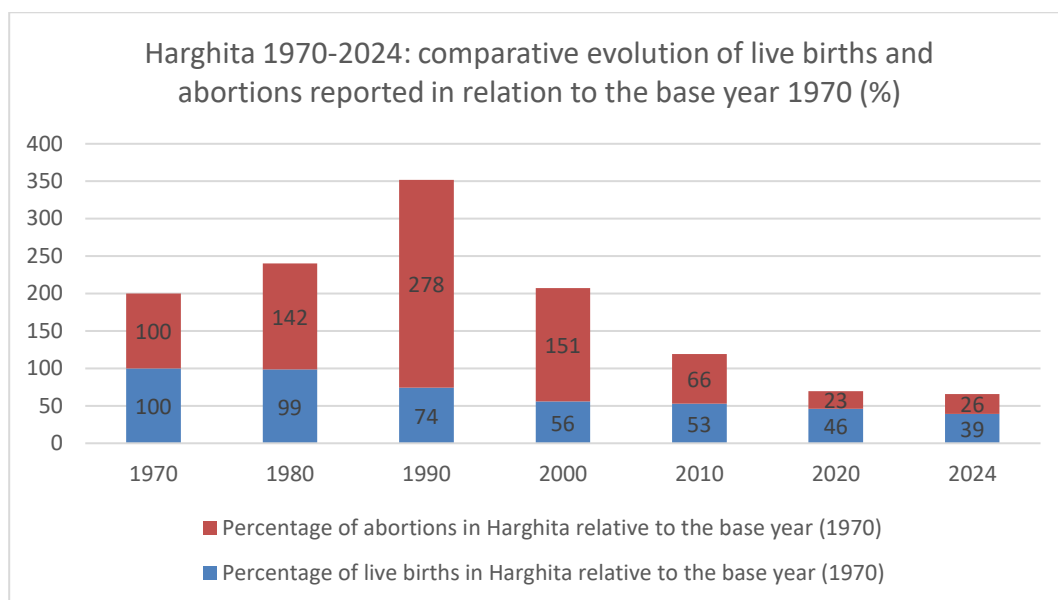


**Figure 4:** Harghita 1970-2024: comparative evolution of live births and abortions (Ibidem).

Another factor influencing demographics is family income, as we assume that this phenomenon is stimulated by the financial support provided: the European Commission points out that in Romania, approximately 20% of employees do not earn enough to make ends meet. Romanians earn several times less than employees in Central and Eastern European countries. Thus, Romanians are at the bottom of the European rankings in terms of salary earnings. Moreover, in 2016, the counties with the lowest salaries in our country were Harghita and Covasna, which ranked third from last (Covasna – 1489 RON) and last (Harghita – 1415 RON) (Daily News, 2017). As a result of Victor Orban's policies, the situation began to change: "after 10 years, the GDP per capita in Covasna is €20,100 per year, and in Harghita €21,000 per year. They are followed by the following counties: Suceava, Neamț, Bacău, Vrancea Galați, Moldova, Buzău, Ialomița, Călărași, Giurgiu, Teleorman, and Dâmbovița in Muntenia, Olt in Oltenia (with Mehedinți below Harghita and on par with Covasna), Satu Mare, Maramureș, and Bistrița in Transylvania" (Peiu, 2025).

Of course, GDP does not necessarily represent the wealth of the population, but rather the flows passing through those counties.

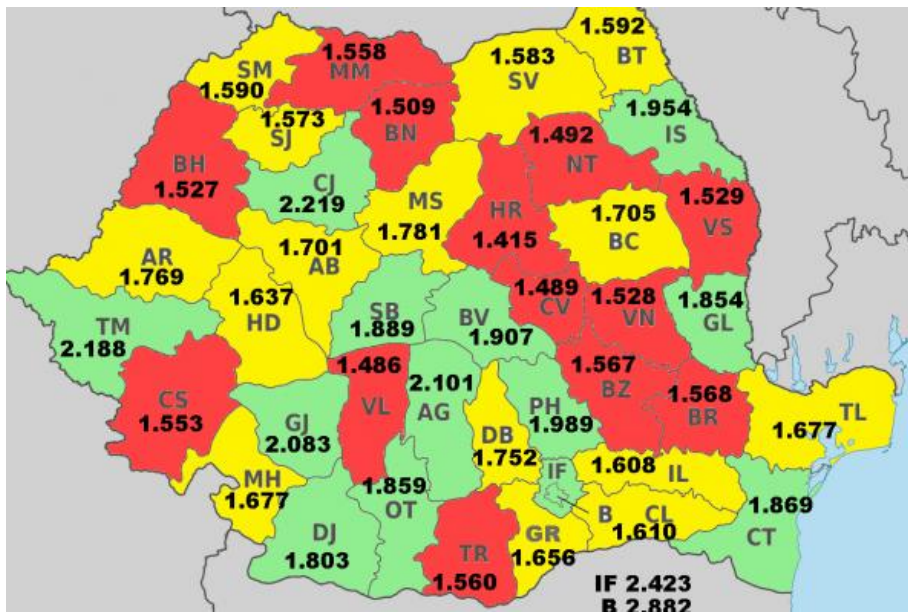


**Figure 5.** Map of salaries by county, in 2016 (Daily News, 2017).

On the other hand, we note that the evolution of the Hungarian population, especially in Harghita and Covasna, is slightly atypical, in the sense that the slow decline in the Hungarian population is not so closely correlated with the general decline in the Hungarian population throughout Romania. Instead, the Romanian population in the three counties follows exactly the general trend of a relatively steep decline.

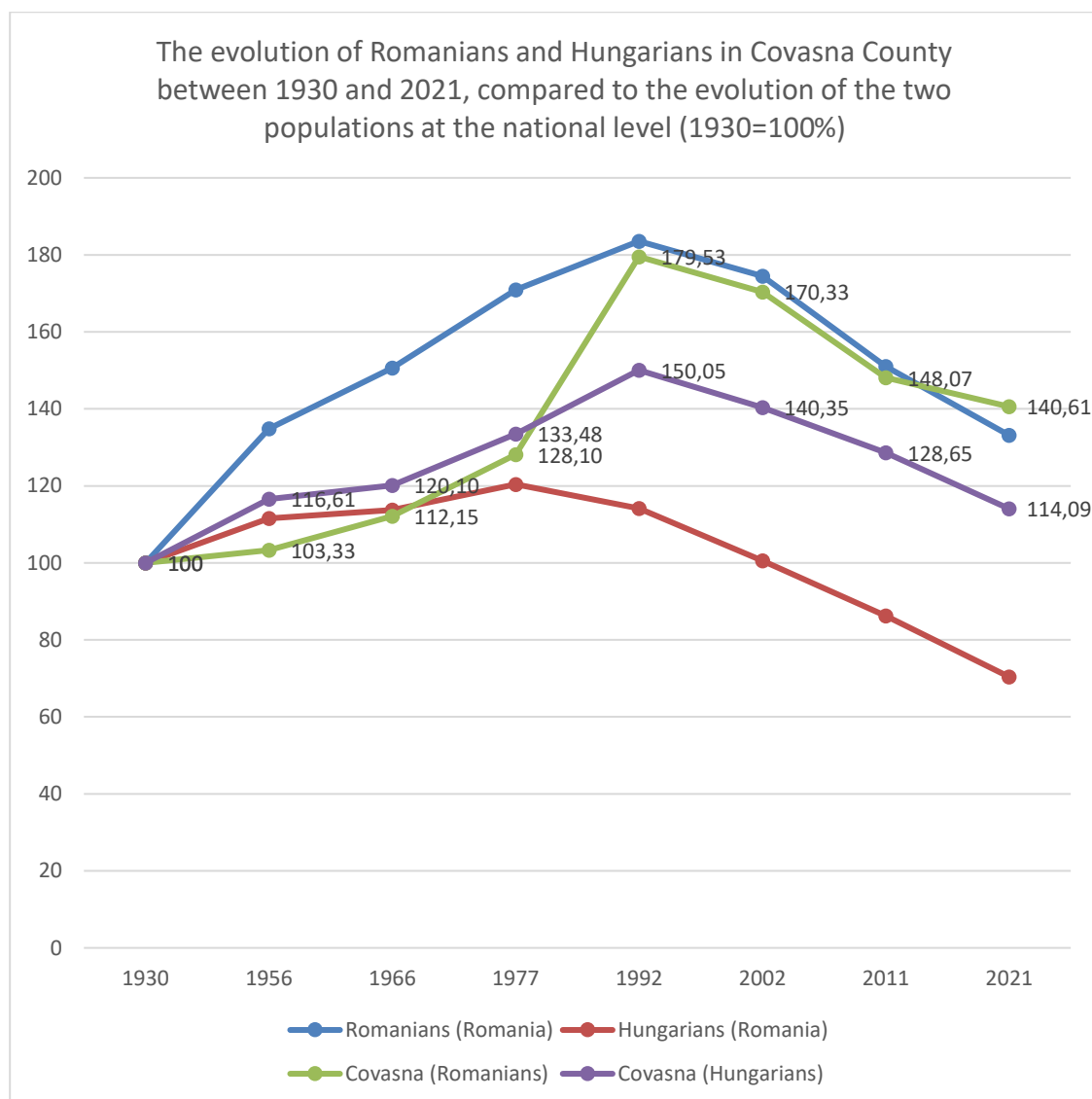


**Figure 6.** Evolution of Romanians and Hungarians in Covasna County between 1930 and 2021, compared to the evolution of the two populations at the national level (1930=100%) (National Institute of Statistics, 2021b). Compared to 1992, the Romanian population in Covasna has decreased by 38.93%, and the Hungarian population by 35.96%.

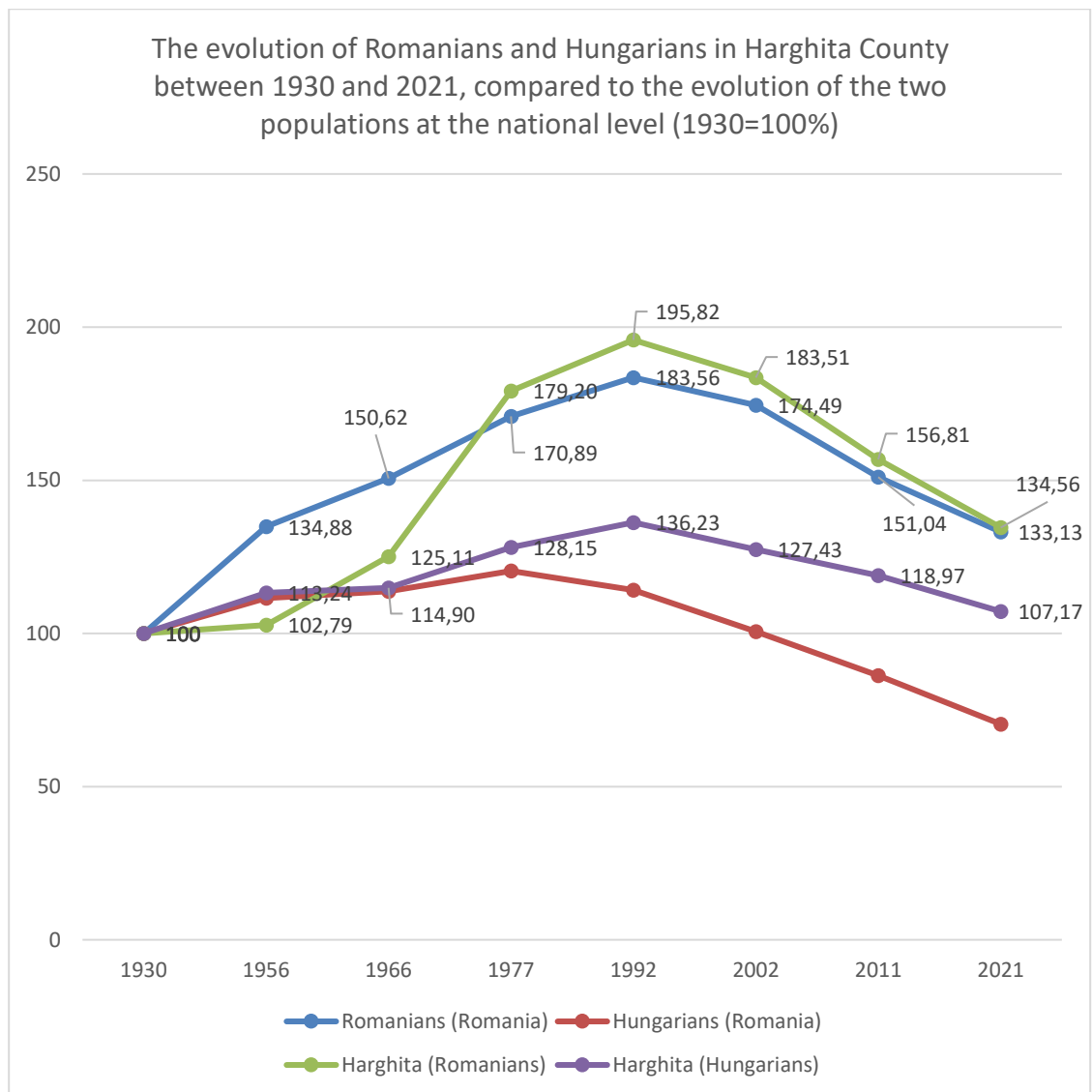


**Figure 7.** Evolution of Romanians and Hungarians in Harghita County between 1930 and 2021, compared to the evolution of the two populations at the national level (1930=100%) (Ibidem). The decline in the Romanian population is 61.26% in 2021 compared to 1992, and that of the Hungarian population is 29.06% in the same period. It can be seen that the decline in the Hungarian population in Harghita is clearly more limited than the overall decline in Romania's population, including that of Hungarians in the rest of the country

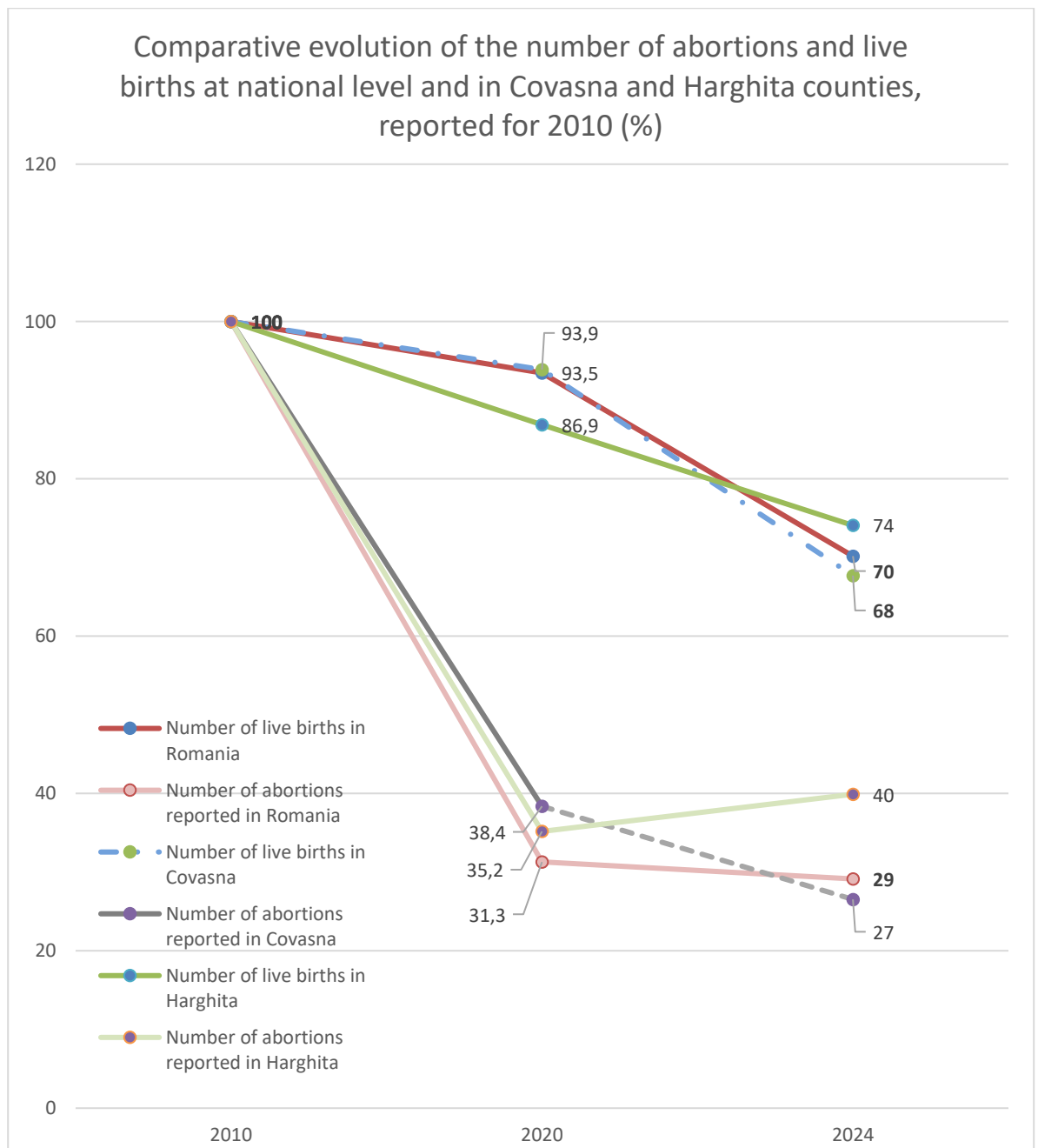


**Figure 8.** Comparative evolution of the number of abortions and live births at national level and in Covasna and Harghita counties, reported for 2010 (%) (Johnston, 2025)

When analyzing the overall figures, we observe that, despite Budapest's strong demographic, economic, political, and geopolitical support policies, compared to 1930, the Hungarian population in the three counties has declined significantly, while the Romanian population, lacking any support, was still holding its own in 2011, a situation that continued in 2021. On the other hand, based on church records,

His Holiness Andrei of Harghita and Covasna stated at the beginning of 2019: "After requesting the reports from the archpriests of the four archpriesthoods of our diocese, I was left with a heavy heart. I asked the state institutions to provide me with a census, which they were unable to do because the Romanian state has not been able to conduct a census since 2011. Do you know how much we have declined? We currently have 50,030 Romanian believers. Our diocese has declined by 30,000. I wonder, if we continue at this rate, where will we end up?" (Drăghici Taraș, 2018). This concern on the part of the high-hierarchy shows that, at the level of subjective perception in important institutions such as the Church, there is a strong concern about population decline.

## 5. Conclusions

This paper deals with the relationship between geopolitics, with an emphasis on its ethno-political aspect, and demographic dynamics in the counties of Harghita and Covasna. In this first part, we have addressed the influence of economic, cultural, and administrative policies, more precisely their financial consistency, which varies according to the criterion of ethnic affiliation, on the demographics of the Hungarian and Romanian communities in the two counties. The data analyzed clearly showed that the actions of the Orban government in Hungary failed to stop the decline of the Hungarian population in Transylvania, while also affecting the demographics of the Romanian community. In the second part of the article, which we will publish later, we will address the issue of differentiation and ethnic pressure factors in the two counties, as well as the collective inferiority complex and stigmatization of the Romanian population.

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## **Observation In Scientific Research: A Powerful Tool For Unveiling Truths And Enhancing Social Understanding**

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### **Abstract:**

Observation is one of the fundamental tools in scientific and social research, playing a crucial role in data collection and analysis of phenomena. This article focuses on the role of observation in research, illustrating how it aids in testing hypotheses and verifying their accuracy, as well as systematically analyzing social realities. Observation is also used to understand social dynamics and cultural interactions, often revealing unexpected details that can lead to the development of new theories or enhance existing understanding of the studied phenomena.

The article covers the key processes of observation, starting with designing appropriate tools, testing their efficiency, and finally executing the observation in the field. It also discusses the importance of systematic analysis of the collected data and how this contributes to achieving a more accurate scientific understanding of social phenomena.

Lastly, the article emphasizes that observation is not just a means of data collection, but a vital element in gaining a deeper understanding of social and cultural contexts. Through observation, researchers can identify social changes and behavioral patterns more comprehensively, which contributes to the advancement of scientific knowledge and progress in various areas of social sciences.

**Keywords:** *Observation, Social Research, Data Analysis, Hypothesis Testing, Social Change, Methodological Tools.*

### **I. Introduction to the Importance of Observation in Scientific Research**

#### **1. Definition of Observation in Scientific Research**

Observation is one of the most essential tools used in scientific research for gathering data and information about various phenomena, whether social or natural. Observation is defined as a systematic and meticulous process of watching events and behaviors in the surrounding environment, recording them objectively for later analysis. While there are numerous research tools available, observation remains a core method because it allows researchers to observe phenomena directly and accurately. In certain cases, observation may be the only viable method for data collection, especially when other tools like surveys or interviews are inappropriate or insufficient (Smith, 2020, p. 45).

Observation can take several forms, such as spontaneous observation and planned observation. Spontaneous observation relies on observing events in an unstructured or informal manner, whereas planned observation is based on a structured framework that organizes processes and records information according to specific standards. In social sciences, observation is used to interpret the behavior of individuals or communities and understand their actions within the social and cultural contexts in which they exist. This

pivotal role of observation makes it indispensable in both experimental and descriptive research.

## **2. Importance of Observation and Its Use in Social Sciences**

In the field of social sciences, observation is considered one of the most critical research tools as it plays a key role in understanding behavioral patterns and social interactions within a community. Observation enables researchers to gain direct insights into how individuals interact with each other and behave in different contexts. Social scientists regard observation as the most suitable tool for examining hypotheses related to social and group behavior. For instance, observation can be used to analyze how relationships form between individuals in society or to understand the dynamics that govern decision-making processes within a specific group (Jones, 2019, p. 62).

Since social behavior is influenced by multiple factors, such as culture, economic environment, and political context, observation allows researchers to observe these factors directly and understand how they impact social phenomena. Observation helps minimize the bias that may occur when data is collected through indirect methods, such as interviews or surveys, where the expectations of the researcher or the responses of participants may affect the quality of the data. Through observation, researchers can obtain more accurate and realistic information, making it an effective tool in social studies.

## **3. Objectives of Observation in Research**

Observation plays a crucial role in achieving several important research objectives, with the primary one being hypothesis verification. Observation provides direct data that enables researchers to evaluate the validity of the hypotheses they have previously established. This process is vital to ensure the accuracy of the results and conclusions drawn by the researcher. Through observation, unexpected aspects of the phenomenon may be revealed that would not surface through other data collection methods, offering a more comprehensive understanding of the studied subject (Brown, 2018, p. 102).

Moreover, observation is a necessary tool for aligning ideas and theories with social reality. When a researcher collects data through observation, they are able to test the applicability of academic theories to real-life situations. By observing the behavior of individuals and their interactions within their natural environment, researchers can confirm the accuracy of scientific hypotheses. This interaction between theory and reality contributes to the improvement and refinement of scientific theories, increasing the reliability of studies and research (Taylor & Gibbs, 2017, p. 78).

Another important objective of observation is exploration. Observation provides researchers with the opportunity to explore new and unexpected aspects of the research topic. Observation can open doors to a deeper understanding of phenomena that may have previously been misunderstood, contributing to new insights within the academic field. In this context, observation serves as a means of expanding the horizons of scientific and social research by leveraging discovery and surprise in data analysis (Hammersley & Atkinson, 2019, p. 93).

## **II. The Concept of Observation in Scientific Research: Three Aspects**

### **1. Hypothesis Testing**

Observation plays a fundamental role in testing hypotheses in scientific research by allowing researchers to evaluate the accuracy of their assumptions and predictions. Hypothesis testing involves comparing theoretical ideas with real-world data gathered through observation, offering a clearer and more accurate picture of the subject being studied. For example, if a researcher hypothesizes that a particular environment influences the behavior of a specific group of people, observing these individuals in that environment allows the researcher to test whether the hypothesis holds true.

Through observation, researchers can compare the collected data with the theoretical framework. If the data align with the hypothesis, it supports or validates the hypothesis, but if the outcomes deviate, it may indicate that the hypothesis needs to be revised or adjusted to fit the new findings. This aspect of research is critical because it helps minimize bias and enhances the accuracy of conclusions (Smith, 2020, p. 45). Observation also helps researchers maintain an objective view, keeping the research grounded in the real world rather than influenced by preconceived notions, ensuring a more impartial and reliable study.

Additionally, observation assists in evaluating independent and dependent variables in social or scientific experiments. When a researcher is uncertain about the relationship between variables, careful observation can provide concrete evidence to confirm or disprove those relationships. In this way, observation becomes a central tool for hypothesis testing and provides factual data that can be relied upon for building new theories or refining existing hypotheses (Brown, 2018, p. 102).

### **2. The Reality Principle in Observation**

The reality principle in observation emphasizes the need for theoretical ideas to align with the actual social reality being studied. In scientific research, theories and hypotheses cannot solely rely on abstract reasoning; they must be grounded in empirical observations from real-world fieldwork. When theoretical assumptions do not match the observed reality, this suggests that the hypothesis may be flawed, or the interpretation of the phenomenon is inaccurate. Therefore, observation serves as a critical tool for analyzing reality and ensuring that theoretical ideas are in sync with field-based findings.

Through observation, researchers gain access to unexpected or unforeseen information that may not have been part of the original hypothesis. For example, a researcher might have a preconceived theory about how a group of people will behave under certain social conditions, but detailed observation might reveal new details or alternative explanations for their behavior. These observations help refine the overall understanding of the phenomenon and provide more accurate and comprehensive results (Jones, 2019, p. 62).

In this sense, observation enables researchers to create a correspondence between theoretical ideas and the data obtained from the field. When hypotheses do not align with the observed reality, this often requires theoretical revisions, leading to the development of more accurate or even entirely new hypotheses. This process increases the reliability of scientific research because the data gathered through observation represent the actual, lived experiences and behaviors of people, not just theoretical conjectures (Taylor & Gibbs, 2017, p. 78).

### **3. Exploration and Surprise in Observation**

One of the most powerful aspects of observation in scientific research is its capacity to foster exploration and generate surprise through the discovery of unexpected insights. When researchers gather data through observation, they often encounter new aspects of the phenomenon being studied that they had not anticipated, leading to novel understandings and breakthroughs. Surprise is a natural part of the observation process, as it can reveal unexpected behavioral patterns, social dynamics, or other factors that were not part of the initial research design.

Exploration through observation enhances the value of scientific research by uncovering hidden or previously unnoticed dimensions of the studied phenomena. In social studies, for example, a researcher may observe behaviors or interactions between individuals that do not align with traditional theories. These unexpected discoveries may open the door to new research avenues or prompt a re-evaluation of existing theoretical interpretations. For instance, during a study of isolated communities, observations might reveal hidden values or beliefs influencing people's behavior in ways that challenge common social theories (Hammersley & Atkinson, 2019, p. 93).

Moreover, exploration through observation can assist researchers in developing new ideas or analytical techniques. When researchers deal with a phenomenon that has not been well-studied, observation provides an exploratory approach, allowing them to analyze the subject from fresh perspectives and offer innovative scientific contributions. The exploratory nature of observation fuels the scientific process by encouraging researchers to seek additional information and analyze the phenomenon in greater depth, leading to the production of new, valuable knowledge (Smith, 2020, p. 45).

### **III. Observation Questions: What Do We Observe? Whom Do We Observe? How Do We Observe?**

#### **1. What Do We Observe? (Defining Relevant Data)**

When considering observation as a research tool, the first question that arises is: what do we observe? In other words, what relevant data should we collect? The answer to this question depends on the concept of variable indicators, which refer to the factors that may change based on the different variables being studied in the research. Thus, determining the appropriate data for analysis requires a deep understanding of the research topic and its objectives.

Relevant data include anything that can help test the research hypotheses. These data can be quantitative or qualitative. Quantitative data rely on precise numbers and statistics, while qualitative data focus on behaviors, personal interactions, and subjective experiences. Determining the type of appropriate data depends on the nature of the research and what the researcher aims to understand or explore. For example, in social research studying individual behavior in a particular environment, it is essential to collect data on interactions between individuals, body language, and facial expressions (Harris, 2020, p. 45).

When determining the appropriate data, the researcher must be careful in selecting the variable indicators that may influence the research results. The choice of these indicators is tied to the hypotheses the researcher seeks to test. For instance, in a study investigating the impact of education on individual behaviors, data about the educational environment, academic performance, and social behavior within these environments should be collected (Kremer, 2021, p. 65).

#### **2. Whom Do We Observe? (Defining the Scope of Analysis and Selecting Observation Units)**

When addressing the question "whom do we observe?", the answer involves identifying the samples that will be the focus of the research. This includes the observation units, which can be individuals, social groups, or even entire communities. The selection of these units depends on the scope and goals of the research. The field of analysis can be geographical, social, or temporal.

The difference between studying large groups and taking representative samples or conducting individual case studies is crucial in social research. Taking representative samples allows the researcher to collect data that can be generalized, while individual case studies offer a deep dive into studying one individual or a small group for more detailed information. For example, if the research aims to study the behavior of a specific population group, representative sampling helps present a comprehensive picture of the behavior (Wilson,



2019, p. 110). On the other hand, if the goal is to study the behavior of an individual in a particular situation, then a case study may be the optimal choice (Jenkins, 2018, p. 92).

Selecting the observation units must be done carefully to ensure that the data collected adequately represent the phenomenon being studied. When choosing samples, the researcher should determine whether a comprehensive study is needed or if smaller samples can represent the larger population (Liu, 2021, p. 74).

### **3. How Do We Observe? (Observation Tools and Data Collection)**

Finally, the critical question arises: how do we observe, i.e., what tools will be used to collect data? The answer depends on the nature of the research and the type of data the researcher wants to collect. Observation tools offer many options, such as questionnaires, interviews, and direct observation. Choosing the right tool depends on the type of data required.

Designing observation tools is a complex process that involves creating questions and specific strategies based on the variable indicators identified at the beginning of the research. For example, if the goal is to collect quantitative data from a large group, questionnaires are an effective method. Questionnaires can be designed with open-ended or closed-ended questions to gather multiple responses from participants (Anderson, 2020, p. 128). If the goal is to collect in-depth qualitative data, personal interviews may be a better option to gain insights into individuals' experiences and feelings.

Direct observation is also a powerful tool for data collection, where the researcher observes individuals in their natural environment without direct interference. This type of observation helps in collecting precise data about unspoken behaviors that may not be available through questionnaires or interviews (Kremer, 2021, p. 74).

When using observation tools, it is important to consider ethical challenges, such as protecting individuals' privacy and ensuring that the observation does not affect their behavior. Adhering to ethical standards in data collection is crucial to ensuring the accuracy and validity of the research findings (Jenkins, 2018, p. 92).

## **IV. The Three Processes of Observation in Research**

### **1. Designing the Observation Tool**

The process of designing an observation tool is a critical step in research as it defines the method by which data will be collected. Common observation tools include questionnaires, interview guides, and observation grids. The choice of tool depends on the nature of the research and the specific objectives. For instance, in social research, closed-ended questionnaires may be used to gather quantitative data, while open-ended interviews may be more effective for collecting in-depth qualitative insights.

When designing the tool, it is essential to define the variables that will be observed accurately, ensuring that the questions or indicators used cover all necessary aspects for analysis. In the case of observation grids, creating a detailed grid that lists all variables and situations that the researcher may encounter during the observation process is advisable. This ensures that the data collected is comprehensive and meets the research's objectives (Smith & Jones, 2019, p. 35).

### **2. Testing the Observation Tool**

Testing the observation tool is a crucial step to ensure its accuracy and suitability for data collection. This test is conducted before the full-scale data collection begins to verify that the tool can capture the required information clearly and effectively. The tool can be tested by using it on a small sample similar to the main research sample.

During the tool's testing phase, researchers focus on several key criteria, such as ease of use, clarity of questions or indicators, and the tool's ability to meet the research's objectives. For example, if the tool is a questionnaire, it must be confirmed that the questions

are clear, unambiguous, and do not overlap. In the case of an observation grid, the grid should be tested in various settings to ensure that it can accurately record data across diverse scenarios.

This step is vital for confirming the validity and reliability of the tool. Validity ensures that the tool measures what it is supposed to measure, while reliability refers to the tool's ability to produce consistent results when used under similar conditions. If the test results reveal issues with any of these aspects, the tool can be refined and adjusted before being officially implemented (Brown, 2021, p. 112).

### **3. Conducting the Observation Process**

Once the observation tool has been tested and refined, the next step is to conduct the observation process and collect data. Observation can be conducted either directly, where the researcher is involved in the situations they are observing, or indirectly, where the researcher remains detached and observes from a distance, often using recording tools.

In direct observation, the researcher collects data in person by being present in the field and participating in the social situations they observe, which allows for the immediate observation of individuals' behaviors and reactions. In this form of observation, the researcher must be sensitive to avoid influencing the behavior of the observed subjects, ensuring that the data reflects real-life actions. Direct observation is commonly used in anthropological and social studies (Gibson, 2020, p. 53).

In contrast, indirect observation involves using tools like cameras or audio recordings to gather data, with the researcher analyzing the information later without directly interacting with the subjects. This approach minimizes the researcher's influence on the phenomenon being studied but may miss some nuanced details that emerge through direct interaction.

To ensure data accuracy, there must be a clear plan for the observation process, including a timeline and detailed field notes on how the observations will be conducted. All observations should be documented systematically, and techniques such as coding or categorization should be used to analyze the data effectively. Additionally, it is crucial to review the data regularly during the observation process to ensure no significant details are overlooked (Miller, 2019, p. 87).

## **V. Methods of Data Collection and the Importance of Systematic Analysis**

### **1. Overview of Main Data Collection Methods**

In scientific research, data collection is a fundamental process that enables researchers to obtain accurate and reliable results. The methods and tools used for data collection vary depending on the type of study and its purpose. Below is an overview of some of the most important data collection methods:

**Questionnaires:** Questionnaires are one of the most common tools used in quantitative research. They consist of a series of closed or open-ended questions designed to collect information from participants. Closed-ended questions provide predefined responses that make it easier to organize and analyze data statistically, while open-ended questions allow participants to express their opinions or experiences freely. Questionnaires are particularly effective when collecting data from a large group of people in a short period (Anderson, 2018, p. 50).

**Interviews:** Interviews are an effective method for collecting qualitative, in-depth data. They can be structured, semi-structured, or unstructured, depending on the level of guidance provided to the participant. In structured interviews, the researcher uses a fixed set of questions asked in the same order to all participants. Semi-structured interviews allow for a general framework of questions, but participants are encouraged to expand on certain points. In unstructured interviews, the interaction is more natural, and the discussion flows with minimal intervention from the researcher (Denzin & Lincoln, 2017, p. 120).

**Direct Observation:** Direct observation involves the researcher being physically present in the environment where the phenomenon occurs and meticulously recording what is happening. This method is commonly used in qualitative studies when the researcher is interested in understanding specific behaviors or interactions within their natural setting. For example, direct observation may be employed to study children's interactions in a school playground or customer behavior in a retail store (Creswell, 2014, p. 78).

**Indirect Observation:** In some cases, data can be collected without the researcher being physically present, using cameras, audio recording devices, or video tools. Indirect observation is useful in situations where participants might alter their behavior due to the presence of the researcher. Using such tools allows researchers to monitor events in an unbiased way and analyze the recorded data later (Silverman, 2015, p. 145).

## 2. The Importance of Systematic Data Analysis

After data is collected using various methods and tools, the next critical step is systematic analysis, which plays a key role in understanding the phenomenon under study. Systematic analysis relies on a set of methods and techniques that ensure accurate results and reliable conclusions.

**Hypothesis Testing:** One of the primary purposes of systematic analysis is to test the hypotheses proposed by the researcher. By analyzing the data, researchers can determine whether their hypotheses are supported or refuted. For instance, if a study aims to examine the effect of a particular variable on behavior, data analysis using statistical tools can identify the strength of the relationship between the variables. Systematic analysis helps organize the data in a clear and logical manner, allowing researchers to discern which factors are significant and which are not (Bryman, 2016, p. 202).

**Qualitative Data Analysis:** In research that involves interviews or observations, qualitative data analysis can be more complex than quantitative analysis. Qualitative data is often analyzed using techniques such as coding, where information is categorized into themes or patterns based on its meaning or relevance to the phenomenon being studied. This analysis allows researchers to identify recurring patterns in the data, such as repeated ideas or behaviors. Qualitative analysis provides deeper insights into complex contexts that may not be evident through quantitative analysis (Strauss & Corbin, 2014, p. 99).

**Advancing Scientific Understanding:** Systematic data analysis contributes significantly to advancing scientific understanding of the studied phenomenon by offering logical interpretations of the collected data. By relying on rigorous analytical methods, researchers can gain a deeper understanding of the phenomenon and offer clear explanations for the underlying factors. In some cases, systematic analysis may uncover unexpected results that prompt researchers to rethink their hypotheses or develop new models for understanding the phenomenon.

**Enhancing Accuracy and Replicability:** Systematic analysis is grounded in rigorous scientific methods that ensure the accuracy of results and their replicability. If the same analytical methods are applied in similar studies, the results should be consistent or comparable, thus reinforcing the reliability of the research. Moreover, systematic analysis minimizes personal or emotional biases in interpreting the data, as it relies on objective scientific criteria (Neuman, 2013, p. 135).

In conclusion, systematic data analysis plays a crucial role in transforming raw data into scientific knowledge that can be understood and used to develop new theories or test existing ones. Without systematic analysis, data would remain unorganized, offering little insight or solutions to the questions posed in the research.

### Conclusion:

Observation plays a pivotal role in both scientific and social research, serving as one of the primary tools researchers rely on to collect data and test hypotheses. Through careful observation, researchers can directly track phenomena in their natural settings, allowing for

an in-depth understanding of how these phenomena develop and how various factors influence them. Whether through direct or indirect observation, this method provides valuable, often unbiased information that deepens the researcher's insight into social phenomena and contributes to theory formation or the validation of existing hypotheses.

Observation also offers researchers primary data that is rich and naturally occurring, as it is gathered without direct intervention. This characteristic makes it particularly useful in social research, where the study of behaviors and social interactions benefits from minimal interference. For example, observation helps in analyzing interpersonal interactions or understanding communication patterns within certain groups. In this sense, observation goes beyond simply gathering data, as it actively contributes to enhancing the scientific understanding of complex and multi-dimensional phenomena.

Moreover, observation helps in developing social theories by revealing new details that might not be apparent through other research tools. It grants researchers the flexibility to adapt their methods and tools based on real-world observations, which can lead to the refinement or improvement of their research approach.

Observation is a powerful tool for uncovering unexpected and novel aspects of social phenomena. By allowing researchers to interact directly with the studied environment, it enables them to notice fine details and factors that might not be easily identified through other research methods, such as surveys or interviews. This makes observation a unique method for understanding social relations and cultural behaviors that might otherwise remain hidden.

Through observation, researchers can detect subtle differences in individual and group behavior, which may point to underlying cultural norms or social dynamics. For instance, observation might reveal power dynamics within a community or patterns of interaction that indicate varying levels of social influence among individuals. Additionally, observation can uncover unexpected factors that shape people's behavior, leading to new discoveries about how decisions are made and interactions unfold in various social environments.

Furthermore, observation can serve as a means to understand social change over time. By observing events and interactions over extended periods, researchers can discover shifts and transformations occurring within a society, whether those changes are rapid or gradual. This capacity makes observation an effective way to study evolving social phenomena, such as shifts in social structures or the development of cultural patterns.

In conclusion, observation stands as an essential tool in social research, providing researchers with the ability to delve deeply into the details of social life. It offers an indirect yet powerful way to explore different aspects of social reality, making it indispensable for developing theories and analyzing social phenomena with precision and depth.

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## The Peasant And Modern Man In Vasile Băncilă's Sociology

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### **Abstract:**

The Romanian philosopher, sociologist, and ethicist Vasile Băncilă (1897-1979) distinguished himself during his lifetime by studying the phenomenon of celebration. The problem of celebration, however, was not the only one that concerned him, as the philosopher analyzed the difference between the Romanian peasant and modern man through his own sociological approach, which he called "spiritual organicism." Băncilă dealt with this problem at an ideal-typical level. The Romanian peasant "in his ideation," "uncontaminated by the city," is characterized by his "patriarchal ethnicity," "cosmic Christianity," "providential thinking," community spirit, and inclination to achieve "maximum festivity" through his "customs." Băncilă opposes the peasant uncontaminated by the city to the modern man, whose birth certificate is the Renaissance. Thus, the modern man, not fully harmonized with the "fundamental reality," is a "moral and metaphysical orphan" who tries, by putting his own person first (individualism), to subordinate general reality (the underlying reality, but also the nature that surrounds him) to his own will, aided by technology and erudition, in order to increase material well-being (epicureanism) and power, believing that he can bring heaven to earth by acting Faustian and pursuing unceasing progress.

**Keywords:** *Vasile Băncilă, Romanian peasant, modern man, modernity, celebration.*

### **1. On the sociology of Vasile Băncilă**

Vasile Băncilă was a prolific thinker. He distinguished himself during the interwar period through his multidisciplinary studies. Băncilă reflected on a variety of fields: from ethics, sociology, theology, aesthetics, to ethnography. As early as 1944, the philosopher wrote about his own system of thought, which he called *providentialism*.

Contrary to materialistic or strictly empiricist thinking, Vasile Băncilă bases his analyses on the premise that there is an "ultimate foundation of reality," a level of reality which, although shrouded in mystery, influences concrete phenomena, as pointed out by anthropologist Gheorghiță Geană: "Providentialism accounts for the ultimate foundation of reality—a mysterious realm that is nevertheless concretely manifest and thus partially accessible" (Geană).

The Romanian philosopher and sociologist's ambition was to solve the problem of modern man distanced from this fundamental reality. In his studies, Băncilă was concerned with finding ways to harmonize modern man with fundamental reality without, however, affecting his personality: "the ideal of culture is to be a humanism based on ontology. (...) What is specific to humans is individualization plus fitting in" (Băncilă, 2007a: 493).

Băncilă applied the concept of providence in several fields of knowledge, including sociology. While in the field of ethics, the philosopher emphasized compassion, morals, and personality as means of harmonizing with fundamental reality, and in the field of aesthetics, he highlighted moral beauty, in sociology,

providentialism took the form of “spiritual organicism”: “For us, society is something organic, rooted in the mystery of things and with purposes that are in accordance with the laws of reality, which transcend society. (...) Society is not a libertinism or a legal or epicurean association of man, but a great collective destiny, which evolves according to profound and, in part, enigmatic laws. Society is, therefore, for us, a kind of organicism, but not biological, rather, we would say, a spiritual organicism. The most appropriate type of this society is the ethnic one. It reflects, as in no other life, the destiny of people. For us, true society is therefore the organic environment that connects man to general reality, to the whole. Contrary to what moderns usually do, we do not tend to replace metaphysical reality, the transcendental absolute, with the visible social, secularizing all values and impoverishing them of their existential density and gravity, through a kind of empirical and presumptuous sociology, but we consider society itself as the environment or instrument through which the deeper will of things becomes more complex and gives itself the opportunity to create more differentiation, thus leading man to the limits of his destiny” (Băncilă, 2007a: 498-499).

Organicist spiritual sociology analyzes social reality based on several premises. Society is not, as contractualists argue, a sum of rational individuals who, through an invisible contract, diminish their freedom in order to be together. Sociality, defined by Ion Ungureanu as “the quality of humans to be social beings and the property of society to constitute itself as a form of human inter-existence” (Ungureanu, 2002: 23), has its source in the fundamental reality of things at Băncilă. By carefully observing Blaga, Băncilă reveals the social character of a man who is as real as can be, even though he is shrouded in mystery (Băncilă, 1935: 370).

The way in which the deep will of things, the fundamental reality, intervenes in concrete reality is destiny. In Băncilă’s system, society represents the means of deep will through which the individual is brought into harmony with his own destiny, as exemplified by Radu Baltasiu: “Destiny belongs to the transcendent and, at the same time belongs to the individual. That is, the individual is not only about what individual traits we see on the street but about his/her transcendental correspondent called by Băncilă ‘the deeper will’” (Baltasiu, 2020a: 96-97).

By the idea of destiny, Băncilă understands both a sociological and ethical meaning. He shows that there are three components of destiny: determinism, fatalism, and human freedom (Băncilă, 2007b). The concept of determinism is closest to empirical sociology. Man’s present position is determined by social causes, but it is not limited to them. Fatalism simply means that “destiny cannot be conceived without a hint of predestination” (Băncilă, 2007b: 213). Behind the chaotic events of people’s lives there is a moral meaning, and a person’s current position is also determined by this meaning. However, whatever the social and ethical (fatalistic) determinism of man may be, he can, through his own freedom, adopt a different social direction, that is, change his own destiny to a certain extent.

On the issue of destiny, Băncilă’s view is similar to that of Dimitrie Gusti. Like Băncilă, Dimitrie Gusti points out that a person’s current social position is based on a causality formed by the framework (“external factors”/“internal environment”) and social will (the voluntary and conscious character of man): “Through voluntary and conscious spiritual life, the determinism of external factors or even of the inner environment loses its power of influence that it has in the realm of dead nature or in

the animal-biological realm and changes into a simple conditioning, that is, a favorable circumstance, instead of a determining cause” (Gusti, 1939: 12).

The determinism of frameworks is not sufficient to understand human action. The perspective of freedom is required, meaning that humans can escape the influence of social and even ethical determinism (fatalistic, of fundamental reality). When it comes to fatalism, Gusti and Băncilă are similar to a certain extent. Like Băncilă, Dimitrie Gusti believes that humans are free to align themselves with the deeper will of things (one of the components of social will being religious sentiment) (Vulcănescu, 2005: 973). However, the founder of the Romanian school of sociology does not claim that there is an underlying reality behind social phenomena, but rather that society is the result of the alignment of social will with religious sentiment, which Băncilă defines as deep will.

The methodological aspect of băncilian sociology resembles that of Max Weber. For the father of sociology, understanding social reality – grasping the meanings individuals attribute to their own social actions – involves comparing the ideal-typical construction of the object of study – rational exaggeration – with the image that emerges from empathization with it (Weber, 1978: 5). Vasile Băncilă keeps the empathetic component unchanged, but makes changes to the ideal-typical construction. Instead of a “rational exaggeration,” Băncilă constructs an image that is as complete as possible from a moral point of view. So, not an ideal-typical rational construction, but an ideal-typical moral one.

Vasile Băncilă’s objectivity stems from his concern for the ideal-typical construction of the object of study. The sociologist attempted to encapsulate the themes he addressed in his essays in formulas that were as morally clear as possible, as Radu Baltasiu shows: “Objectivity, in Băncilă’s terms, refers to the ability to get in full the meaning of the object phenomenon while preserving its integrity” (Baltasiu, 2020a: 95).

## **2. The “ideation” of the Romanian peasant according to Vasile Băncilă**

Băncilă is concerned with the ideal-typical profile of the peasant. Băncilă was aware of the cultural changes that the peasantry had undergone over the last century and more. For example, the Romanian ethicist observed that through “contamination with the city,” the peasantry was losing its festive character. At the center of Băncilă’s analysis, therefore, we have the peasant “uncontaminated by the city”, “the true peasant”, or “the ‘ideation’ of the Romanian peasant” (Băncilă, 2006a: 529). Băncilă warns the reader that he is not analyzing the empirical peasant, but rather “how he should be” from a moral point of view. The ideal peasant, or, in other words, the idea of the peasant, which the sociologist does not separate from religion and morality. The idea of ideation appears, for example, when he describes the essential traits of the peasant (which we will develop below): “Indeed, anyone who wishes to study the Romanian peasant’s way of thinking will have to delve deeper into these three factors, which have enriched the Romanian phenomenon in its most noble aspects: Christianity, stoicism, and naturalism” (Băncilă, 2006a: 529).



### **a) Ethnic patriarchal and stoic Christian**

For Băncilă, the Romanian peasant was a festive anthropological type par excellence. We acknowledge that, for the sake of clarity, we have arbitrarily distinguished the general characteristics of the peasant from those specific to the way he celebrates, because for Băncilă, all the characteristics of the peasant class “uncontaminated by the city” have a festive character.

The term used by the Romanian sociologist to describe the peasant is “ethnic patriarchal,” a designation that has several variations: the peasant lived in an “ethnographic and patriarchal culture”(Băncilă, 2007a: 493), or in a patriarchal community/society.

The Romanian philosopher treated peasants as the cultural foundation of the Romanian ethnic group, especially since, during the sociologist’s lifetime, Romanians were predominantly part of the peasant class: “However, for these norms and attitudes to take root and bear fruit in the field of festive education, teachers must be aware of the importance of the philosophy of celebration in enriching life. They must look carefully and with infinite respect at the traditional world of our villages and the treasures of folklore, where the deposits of celebration are preserved, with the conviction that we were a people of peasants and must remain a people of peasants in culture as well, if we want to offer the world an original and essential spiritual configuration”(Băncilă, 2006a: 536).

Three traits are predominant in the patriarchal ethnic group: Christianity, stoicism, and naturalism. In describing it in this way, Băncilă echoes Mircea Eliade, the great historian of religions, who called the religion of the Romanian peasant cosmic Christianity: the integration of pre-Christian (magical) elements into the institutionalized belief system of Christianity (Cuciuc and Gheorghe, 2003: 126). Moreover, with regard to Christianity, the sociologist notes that the religion of the patriarchal ethnic group is a cosmogonic one (Băncilă, 2003: 17): “Who does not know that the true peasant is temperate and wise like a Christian stoic? And to stoicism and Christianity, the Romanian peasant added the experience of his rich and robust naturalism, as a pastoral and agricultural people, living and tempered among the periodic miracles of nature, in landscapes both colorful and anonymous, among plants and animals. The broad naturalistic framework of his life made the peasant admire the cosmos even more and penetrate even deeper into the knowledge and power of God. Indeed, anyone who wants to study the Romanian peasant’s way of thinking will have to delve into these three factors, which have fertilized the Romanian phenomenon in its most noble aspects: Christianity, stoicism, and naturalism” (Băncilă, 2006a: 529).

The ideal type of Romanian peasant is based on the trinity of Christian, stoic, and natural. His inclination towards “natural life” derives from his way of working (pastoral and agricultural) and from the geographical environment in which he has lived for centuries (“lived and tempered among the periodic wonders of nature”). His stoicism stems from his ability to endure the harsh conditions of life. Thinking providentially about life (Băncilă, 2015: 318) and living stoically in the harsh conditions of nature, the peasant in his imagination managed to create the synthesis of cosmic Christianity, a specific experience of the sacred derived from the three traits identified by Băncilă.

### b) Live and think providentially

In the providential system of thinking proposed by Băncilă, the peasant, uncontaminated by the city, occupies a special place, representing an anthropological model that solves the problem preoccupying the philosopher: how can man be integrated into the fundamental reality of things (“to moralize him”)? In Băncilă’s view, the peasant is a good example of “ontological framing” (Băncilă, 2015: 318), an example to follow for modern man, “[possessing] like no other the secret of reconciliation with this life” (Bănciă, 2006a: 528-529).

The peasant lives and thinks providentially. He “feels he is living in an orderly and meaningful world, a world permeated by a providential spirit” (Băncilă, 2015: 318). Here we find another parallel with the Bucharest School of Sociology. Analyzing the categories of thought through which the peasants he studied interpreted their existence, sociologist and economist Mircea Vulcănescu observed the providential nature of their philosophy of life. Vulcănescu discovered that peasants interpreted the course of their lives through categories such as: person („ins” in romanian), figure („chip” in romanian), nature („fire” in romanian), purpose („rost” in romanian), fate („soartă” in romanian), world („lume” in romanian), God, and the Mother of God (Baltasiu, 2020b).

We observe the providential nature of peasant thinking through another observation made by Vasile Băncilă. Peasant propriety is also part of the “Romanian peasant’s ideation.” What characterizes the peasant is a certain *discreet monumentality* („monumentalitatea discrietă” in romanian) (Băncilă, 2006b: 339), the awareness that there is and manifests itself in his world “something greater than himself”.

We ask ourselves how the peasant in the story fits into the fundamental reality, managing to think and live providentially. Băncilă shows us two ways: mercy and morals. Mercy has the power to make a person “step outside of themselves,” away from their concern for self. That is why, for Băncilă, mercy represents “the echo of the general in man.” It is no wonder that in a community dominated by *personal anonymity* („anonomiatul personal” in romanian language), mercy emerges, through which man puts the community above himself. We will write more about customs in the chapter on Romanian peasant celebrations. Let us pause for a moment to consider the ability of customs to connect people to the wider reality, because “they originally contained a metaphysical intuition” (Băncilă, 2007a: 496). Băncilă’s concept of customs is close to Max Weber’s understanding of the same term, namely that of rules “which [are] kept on the beaten track simply because men are ‘accustomed’ to it and persist in it by unreflective imitation” (Weber, 1978).

Contrary to the perception that Vasile Băncilă presents the peasantry in a laudatory manner, he ends up criticizing their integration into fundamental reality through pity and morals, calling it vegetative. Peasants did not fit into the general reality in a “critical and conscious” way, as modern man *could do* if he focused on developing his own personality: “However, there is a danger: the purely vegetative framing of man in reality. This type of framing is complete in the animal and plant kingdoms. It is partial or even dominant in ethnographic and patriarchal culture. It is almost completely absent from the life of modern man, who, instead, has left or risks leaving reality and perishing. Better vegetative framing than departure from reality. Patriarchal life has advantages of harmony and depth that modern life does not have

by any means. And then, it is a great exaggeration to say that ethnographic and patriarchal man was fatalistic and vegetative. This may have been true in individual life, but not in collective life. Society was creative in the first place, it had initiative, it created a type of culture which, if not very differentiated in itself, had a harmony and a deep adherence to reality, which had to remain as an ideal. For the ideal to be complete, however, it is necessary to combine the advantages of harmonious adaptation with those of critical, conscious adaptation” (Băncilă, 2007a: 493).

### **c) Community spirit**

The concept of community has a special meaning at Băncilă, as not every group of people is automatically a community. In order to be called such, the social relationships within the group must be based on a certain “*spiritual osmosis*” („osmoză spirituală” in romanian language) so that the members of the group acquire a sense of continuity even after they leave that community: “A community is a society in which there is a kind of spiritual osmosis between its members, so that it becomes a large family and, to a certain extent, gives the individual a feeling of immortality” (Băncilă, 2014a: 20).

The communitarian character of the peasant can also be observed in his personal anonymity, the preponderance of the community in terms of creative acts. If the peasant himself has the status of personal anonymity among his peers, especially during festive periods, the ego gives way to the collective self, with a prevailing “feeling of community full of society” (Băncilă, 2006c: 330), then his creative acts (such as updating traditions through customs) have a communitarian character: they are carried out within the spiritually osmotic collective, and the initiative for creation belongs to the collective as a whole. For example, changes in the tradition of caroling take place in accordance with the community’s calendar of holidays, and the manifestation of creation (caroling itself) also takes place within the community: “Society was creative back then, it had initiative, it created a type of culture that, while not particularly diverse in itself, had a harmony and a deep connection to reality that was to remain an ideal. For the ideal to be complete, however, it is necessary to combine the advantages of harmonious integration with those of critical, conscious integration” (Băncilă, 2007a: 493).

### **d) The holiday and the Romanian peasant**

Celebrations occupy a central place in the peasant’s understanding because, together with the child, he “truly celebrates” in Băncilă’s view: “First, they must know that holidays are only truly beautiful if we celebrate them in the way our ancestors did. For our ancestors, mostly peasants, pure of heart and healthy of spirit, had something of the soul of children” (Băncilă, 2006d: 235).

Vasile Băncilă does not analyze the peasant outside the context of the festive phenomenon, which occupies a significant place in his life. The general characteristics of the peasant have been separated from the festive ones in an arbitrary manner for the sake of clarity. Let us therefore specify the connection between the above traits and the festive occasion, and then focus on the characteristics that we considered specific to the festive occasion.

Peasants, uncontaminated by city life, celebrate the festive season by embracing cosmic Christianity (a synthesis of Christian, Stoic, and natural trinities).

Festive acts bring to life religious or pagan motifs, but integrated into Christianity. Animals and plants are personified, being transformed into festive motifs, as shown by ethnologist Ion Ghinoiu in the Romanian pantheon (Ghinoiu, 2001: VI).

Providential thinking and living bring him into harmony with the underlying reality of things, which can be seen in the way he celebrates. Vasile Băncilă placed celebration at the center of his system, believing that it could ontologically reframe humanity. Through its providential character, the peasant celebration resolves the problem of immorality.

If the festive act does not take place in solitude, then we observe in the peasant's imagination the environment conducive to celebration, namely the community.

### **i) “Patriarchal (peasant) customs”: “the festive maximum”**

Peasant customs, also known as *patriarchal* customs, contain the elements that make up the celebration, Băncilă shows us. What are customs, we wonder?

Customs represent the concrete part of culture, its “living body,” which means a certain attitude toward life “manifested in collective practices.” “Customs” represent the implementation of an attitude towards the underlying reality of things, towards ethical, aesthetic and religious values pursued for their own sake, independently “regardless of their chances of success” (Weber, 1978: 24-25). If “the organization of transcendental visions” represents the abstract of culture, by customs we mean those collective practices carried out in accordance with this vision, the concrete moral-religious order: “Customs are, therefore, the living body of culture. To be so, we must understand them in their broadest and deepest sense, as a coherent set of attitudes towards the world and life, manifested in collective practices that are more or less picturesque, but always in accordance with their spiritual meaning” (Băncilă, 2006c: 327).

Holidays represent the culmination of “peasant customs.” Not all customs are festive acts, but those that are contain a festive character. Thus, Băncilă refers to peasant customs in his writings as “festive maxims” (Băncilă, 2006c: 329). Why do peasant customs represent “festive maxims,” we ask ourselves? Băncilă's answer lies in their success in being a place “where philosophy, art, and religion meet in a common way of knowing” (Băncilă, 2014b: 81).

The sociologist considers culture in its two forms: the abstract (“the world within: the natural and the metaphysical”) and the concrete (“the phenomenon, the history”). In abstract terms, culture represents “the organization of transcendental vision,” “the intuition of pure moral fact” (Băncilă, 2006c: 328). The difference between humans and animals lies in humans' ability to relate to the transcendent through their cultural acts (Băncilă, 2006c: 324). The act of culture, the organization of transcendental vision, means “the passage of general meanings, of the great veins of existence, through individual consciousness and its structuring into a harmonious consistency” (Băncilă, 1935: 372).

We can better understand Băncilă's vision if we bring into the discussion the theologian Nichifor Crainic with his concept of *nostalgia for paradise* (Crainic, 1994). Culture, in the abstract, represents the expression of man's nostalgia for perfect (paradisiacal) reality. For Băncilă, culture essentially overlaps with the moral and religious order of a community.

It should be noted here that Băncilă contrasts culture with the civilization specific to the modern era. Characteristic of civilization is “the splendor of the material apparatus of life, the refinement and complexity of the lifestyle in terms of comfort and all the subtle and convenient cares for the maintenance of life” (Băncilă, 1935: 369). The material apparatus of life refers to the technology used by humans to ensure comfort. If by culture Băncilă refers to the spiritual, the abstract, the metaphysical, by civilization he means the material, the concrete, technology, and comfort.

Returning to the issue of culture, Băncilă criticizes those analysts who “have impoverished morals of what is deeply real in them, of their metaphysical essence” (Băncilă, 2006c: 328). Even if the “metaphysical essence” of culture cannot be empirically proven, man’s attempt to reflect moral values in his actions is a fact. Max Weber, for example, introduced into his typology of social action the concept of rationally valued action (Weber, 1978: 24-25): “The mistake made by the sociologists mentioned above is therefore twofold: they impoverished morals of what is deeply real in them, of their metaphysical essence, and then sought to base the science of morality on such morals, without knowing that they brought with them the intuition of pure morality, which they could not extract from mere forms” (Băncilă, 2006c: 328).

#### **ii) Time organization: between holidays and in accordance with the Christian calendar. The issue of calendar reform after the Great Union**

Another characteristic specific to Romanian peasant celebrations is related to the organization of their time. Activities in an annual cycle were organized according to a popular calendar passed down orally from generation to generation (Ghinoiu, 2001: VIII), in such a way that “working days were attached to holidays” (Băncilă, 2006b: 550). For example, the beginning of the pastoral cycle was marked by a ceremony of death and rebirth of Saint George (Ghinoiu, 2001: 2), agrarian deity “over whom Christianity superimposed Saint George the Great Martyr” (Ghinoiu, 2001: 165).

In his very first appearance in Romanian publishing (with the work “Calendar Reform: Reasons and Organization of Calendar Reform” in issue 159 of the 1924 newspaper *Ideea Europeană*), Băncilă raised the issue of the peasant’s relationship to his own calendar for organizing holidays in the context of the adoption by the Kingdom of Romania (1919) and the Romanian Orthodox Church (1924) of the Gregorian calendar after the geopolitical changes that occurred after World War I. The change in the calendar was not welcomed by the peasantry of the time, as their relationship to the calendar was different from that of the authorities and high prelates.

For peasants, the holiday calendar is not a convention or an expression of astronomical knowledge, but rather, in their providential thinking, they perceive it as a given, a religious revelation, a traditional historical prejudice considered immutable. That is why it is imbued with sacredness (Băncilă, 2003: 15): “For the people, the calendar is not a convenient convention, kept as long as it is convenient, because the people do not know relativistic logic; nor do they have an astronomical conception of the calendar, as intellectuals do. Rather, for them, the calendar is a tradition indestructibly woven into their entire attitude and accommodation towards life” (Băncilă, 2003: 15).

## 2) Modern man

For Vasile Băncilă, modern man is, from an anthropological point of view, in opposition to the peasant, to the patriarchal ethnic group, being ideally characterized by the following traits:

- Metaphysical revolt;
- Metaphysical and moral Orphism;
- Individualism;
- Decline in community spirit;
- Mechanistic reporting on the surrounding nature;
- Focused on the Faustian time;
- Creator of a civilization that subordinated culture.

We note that Băncilă described the ideal-typical modern man on several coordinates: religiously (metaphysical revolt, metaphysical and moral orphism), strictly socially (individualism, decline of community spirit), ecologically (a mechanistic approach to the surrounding nature), in terms of the analysis of the relationship with time (focused on Faustian time), and culturally (creator of a civilization that has subordinated culture).

### a) **Metaphysical revolt, Metaphysical and moral Orphism**

The first characteristic of modern man is related to the moment of his appearance. For Băncilă, concerned with the moral dimension of man, with his harmonization with the underlying reality, modern man appeared with the Renaissance (Băncilă, 2006b: 342), when, on a philosophical and religious level, God was no longer at the center of human existence, man taking his place. Thus, from then until the post-war period, metaphysical rebellion characterised man in general. That is why the weak contact with underlying reality transforms the modern man into a metaphysical and moral orphan: “The metaphysical revolt (the philosophy of absurdity—the most ‘absurd’ philosophy in all of history, but one which, unfortunately, has given expression to the disfigured, deformed, and proud contemporary man)” (Băncilă, 2014c: 93).

### b) **Individualism and the decline in community spirit**

Individualism is another major feature of modernity in Băncilă’s system of thought. We recall that through his providentialism, he theorizes reality on several levels (philosophical, ethical, sociological, psychological, and aesthetic) starting from the axiom that there is a deep will of things, the expression of a perfect reality, which, although it cannot be captured by measurement techniques, interacts with empirical reality. Thus, with the metaphysical revolt of the Renaissance, modern man began to perceive fundamental reality as something morally neutral, as a simple object that he could manage, in his own pride, according to his powers. For Vasile Băncilă, individualism represents man’s attempt to subject the deep will of things to his own particular will. Instead of submitting to underlying reality, modern man rebels and tries to subjugate or ignore this reality: “Modern man is a revolutionary, a rebel proud of his personal power. He has shown this pride not only towards his fellow men, but also towards cosmic and metaphysical reality. He began modern history by attempting to confiscate for his own use the reason that his ancestors saw in the universe and in God. Great, objective reason was despised or denied, and instead it was said that the whole meaning of life lies in each individual, in the human person.

Modern man wanted general reality to be something neutral, if not absurd, so that he could exercise his power over this reality, so that it could be shaped according to his lust for power. This is called individualism” (Băncilă, 2006a: 530).

Băncilă discusses the *generalization of individualism* in modernity. Individualism has thus become a social norm. The sociologist does not deny that individualism did not exist in the peasant world, but there it was not generalized. In other words, modernity has increased the proportion of individualistic attitudes within a community, an attitude that already existed and was predominant in the early peasant world: “Băncilă discusses the generalization of individualism in modernity. Individualism has thus become a social norm. The sociologist does not deny that individualism did not exist in the peasant world, but there it was not generalized. In other words, modernity has increased the proportion of individualistic attitudes within a community, an attitude that already existed and was predominant in the early peasant world” (Băncilă, 2006b: 342).

The spread of individualism has been detrimental to community cohesion. Băncilă shows that modern man is also characterized by the loss of the communal nature of his social life. The loss of community spirit is caused by a change in philosophical attitude (metaphysical rebellion, individualism), but also by the emergence and use of modern technologies. Widespread technology (television, radio, reading, or, in the contemporary period, smartphones and social media platforms) actually represents means of the disappearance of the community phenomenon from history: “In the past, when peasants and shepherds met, they created community and folklore. Today, radio and television destroy community: contrary to appearances, people become more individualized through them. Reading, radio, television: means of eliminating the phenomenon of community from history” (Băncilă, 2014d: 72).

### **c) Mechanistic reporting on the surrounding nature**

If the peasant related to the surrounding nature stoically, morally, and religiously, that is, in relation to his cosmic Christianity, modern man does so mechanistically. His individualism – the imposition of his own will to the detriment of underlying reality – is also manifested in the case of nature. Excessive pollution is possible by virtue of such an attitude; modern man does not feel “the cosmos as a big family.” Studying nature through scientific methods cannot give rise to the feeling that he is part of the same “big family” as the surrounding nature, which Băncilă calls “spiritual companionship”: “Modern science has accustomed us to the idea that humans are very close to animals, the difference being more one of degree. It would therefore have been logical for us to feel close to them. But the opposite has happened. Morally, we have distanced ourselves from the animal world. In the society of love, he was close to them. The Romans had a day when they used to decorate animals with wreaths, man considered himself essentially different from animals, but through animals with wreaths. The Romanian people realized such a spiritual connection with animals that at times they even introduced them into their religious community. They gave holy water to animals, just as, in recent times, they gave them water from Zmeeni or Maglavit. (...) There is a fundamental fact here, full of consequences: modern man is increasingly losing the society of animals and entering the ‘society’ of machines” (Băncilă, 2006b: 346).

#### **d) Focused on the Faustian time**

Another difference between the man of ethnic patriarchy and modern man is their relationship to time. For modern man, time has taken on a “dynamic, Faustian character, marked by rapid acceleration and exasperating restlessness” (Băncilă, 2014a: 17), so that his working days are no longer related to holidays, as in the case of the peasant in the idealization. Festive time “follows” working time, not the other way around, as in the case of the patriarchal ethnic group (Băncilă, 2006b: 550).

Without clarifying the terms, Băncilă writes about the artificial time of modern man and the organic time of the peasant (Băncilă, 2014a: 21). However, the sociologist is more concerned with the consequences of modern time reporting, which he mentions:

1. concern for future progress and disconnection from the past (Băncilă, 2014a: 17);
2. “man no longer finds himself” (Băncilă, 2014a: 17);
3. the feeling of nothingness arises (Băncilă, 2014a: 17) from the separation of individual time from communal and cosmic time (Băncilă, 2014a: 20).
4. “people today feel that their spiritual heritage is disappearing because of the accelerated pace of time and history” (Băncilă, 2014a: 18-19). So he developed an entire *industry of commemorations* (Băncilă, 2014a: 18-19).

#### **e) Creator of a civilization that subordinated culture**

Băncilă also writes about modernity when he raises the issue of the difference between culture and civilization. By culture, the philosopher means the moral and religious order of a community, and by civilization, he means the material order (the technology that ensures the comfort of life). While in patriarchal, peasant, ethnographic societies, civilization was subordinate to culture, in modern societies the relationship has changed in the sense that culture (the moral-religious order) no longer provides the goals for the use of technology: “The Gluga, the art of building houses, the technique of shepherd dueling, the secret recipes of folk medicine, which sometimes surpassed the capabilities of today’s medicine, and a series of wonderful tools created by Romanian technical genius, formed a domestic civilization, which was imbued with and enhanced by cultural attitudes, forming a whole. In ethnographic and patriarchal times, there was harmony between the deeply spiritual and the technical” (Băncilă, 1935: 382).

The reversal of the relationship of subordination led to the emergence of a crisis of moral and religious order in the modern era, a crisis that Băncilă intended to resolve through his providential system of thought. The crisis of modern culture is, in fact, an expression of the crisis of peasant culture through the penetration of modern technologies into the village world, as the brilliant Mihai Eminescu summarized in a verse: “Eminescu, who was the greatest social and political thinker in our country, to whom all those who thought Romanian in this field are indebted, after him, when he said: ‘And as they come by rail/All songs perish,’ condensed in a few words not only the story of the transformation of Romanian society in the contemporary era, but also indicated a philosophy of culture, history, and technology” (Băncilă, 1935: 385).

Băncilă, following in Eminescu’s footsteps, intuited that technology is not neutral; technology not only provides you with the means to achieve a cultural goal,



but also, especially in the case of today's technologies, provides you with the goals to pursue. We will not address the issue of technology's lack of neutrality here, as it has been extensively discussed by media theorist Neil Postman in a work translated and published in Romania (Postam, 2023). We will limit ourselves to presenting Băncilă's idea: "technology is international, but not neutral," meaning that it penetrates any culture of a community, changing that very culture: "Technical products can serve as vehicles for foreign ways of thinking and feeling, just as microbes come on various goods. In this sense, it can be said that technology is international, but not neutral. (...) Foreign habits of thought and feeling either remain parasitic, powerless, where they were brought, but managing to prevent local forms from fulfilling their purpose, or they dissolve the latter altogether. (...) Moreover, by importing contradictory habits of thought and feeling from all corners of the world, moral and religious scepticism is produced, in which no culture can thrive" (Băncilă, 1935: 384).

If we have brought modern technology into the discussion, we must point out that, in relation to this, Băncilă theorizes other characteristics of modern man. Modern man attempts to become a *demiurge through technology* (Băncilă, 1935: 383), that is, to impose their individual will with the help of technology, acquiring abilities attributed only to the divine. Thus, technological development has become a myth which, together with the belief in unceasing progress, offers modern man the illusion that he can recreate paradise (the perfect world) here on earth (Băncilă, 1935: 385). We recall that archaic man attempted something similar through the act of celebration. The peasant in his imagination paradise his time through celebration, without, however, having the belief, like modern man, that he will ever be able to create paradise on earth.

Băncilă describes modern man as being focused on acquiring sensory pleasures (epicureanism) (Băncilă, 1935: 385), trying to acquire a high level of erudition that ethicists call *empty intelligence* because it does not moralize, that is, it does not help him harmonize with the underlying reality of things (Băncilă, 1935: 385).

### 3) Conclusions

The concern for drawing distinctions between peasants and modern man is part of the theoretical corpus of Vasile Băncilă's sociology, which focuses on the issue of celebration. The basis of the discussion is the "providentialist" thesis, according to which, in order to understand reality, one must also consider the "deep will of things." We can speak of a branch of sociology concerned with the study of morality in society.

Focusing on the ideal-typical moral description of human typologies as the basis of objectivity, in Vasile Băncilă's sociology, the peasant "from ideation," "uncontaminated by the city," is characterized by:

- ontologically framed being, thinking and living providentially;
- creator of culture (moral-religious order), which, through its concrete expression – customs – produces authentic celebrations, that is, those festive acts that frame man in the fundamental reality of things. Man of "maximum festivity".
- the quintessential communitarian, characterized by personal anonymity;
- synthesis of Christianity, naturalism, and stoicism – cosmic Christianity;

- patriarchal ethnic.

At the opposite end of the spectrum from the peasant is the modern man described in Vasile Băncilă's sociology as:

- a human type that is out of step with the underlying reality of things, characterized by rebellion and metaphysical orphanhood, even despite his own great erudition;
- creator of civilization, who through technology manages to bring about changes even in peasant culture;
- the individualistic man, who imposes his will, treating even nature as a mechanism that he can control according to his powers and for his own well-being (epicureanism);
- acting in a world where authentic celebration is in decline, trying to perfect reality through constant action and belief in the continuous progress of things in such a way as to achieve a utopian paradise on earth.

Băncilă's sociology draws our attention today through its relevance, namely that in analyzing modern and postmodern man, we must not ignore the decline in morality, which Băncilă called "the lack of alignment with the fundamental reality of things." Morality serves to strengthen social bonds within a community; without it, people become isolated and anomic.

Băncilă also proposes that sociologists study how postmodern man celebrates, given the ability of celebration to remoralize modern or postmodern man. For a development, therefore, of the sociology of celebration, a fruitful endeavor that sociologist Radu Baltasiu undertakes by arguing that Băncilă laid the foundations for a new sociological paradigm – the paradigm of revival (Baltasiu, 2020a: 96-97).

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## **Crisis, Emotion, And Control: Rethinking Governance And Institutional Responses To Uncertainty**

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### **Abstract:**

*This study explores how fear and uncertainty, particularly during crises, shape states' behavior and governance models. By adopting a naturalistic perspective rooted in natural human responses to fear and uncertainty, this paper uses the European Union as a case study to examine how modes of governance shift during crises compared to periods of relative stability. To explain the European governance, the study proposes the adaptive theory of governance grounded in human nature, analyzing state and institutional reflexivity, behavioral symmetry, fear-driven decision-making, and the dynamics of adaptive behavior. The study includes an empirical section analyzing breaches of European law, specifically the infringement cases initiated by the European Commission between 2007 and 2022 in the areas of justice, fundamental rights, and citizenship, as well as employment, social affairs, and equal opportunities. The results reveal a correlation between peaks in EU law violations and the major crises experienced by the EU. Furthermore, as crisis severity increases, the rate of violations rises accordingly. The study also finds that breaches occur across all member states during periods of crisis and significant change, regardless of the intensity of Eurosceptic discourse.*

**Keywords:** Governance; Adaptive Governance; Fear; Institutional reflexivity; Behavioral symmetry

### **1. Introduction**

Governance, is a process of organizing the society, the act of governing through which are established rules, strategies and new actions that can help society achieve its general purpose. For centuries, we exercised a national model of governance, which grounded in our minds the concept of national interest that stopped at the borders of each country.

The emergence of the EU brought in front of us a new model of social organization and thinking, based on a different set of values and principles, that changed the type of governance we were used to and raised questions regarding the new model.

Proponents of power theories, such as realists, focused their arguments on the dynamics of power, the state vitality in international relations, and the self-centered, survival-oriented human nature (Forde, 1992). Realism explained state behavior until the late 1990s when the rise of the EU, market interconnectivity, and globalization have questioned the role of nation states as the primary actors in international relations. Also, the growing power of non-state actors, increased capital mobility, and realism's inability to "explain the amount, direction or causes of foreign investments" (Dassbach, 1998: 146).

Realism's weaknesses served as a starting point for advocates of liberalism and neoliberalism. The liberals focused on "the self-interested individual, free market, and the self-regulated economics" (Southgate and Bennett, 2016) to explain states behavior. While the neoliberals discussed about the necessity of specific actors, rules, and mechanisms to control market behavior (Ban, 2016).

In terms of human nature and rationality, the liberals focused on democracy, liberty, and equality, supporting individual life and liberty to decide on personal matters. They encouraged individual rights, and supported the rule of law, the separation of powers, the free market, the minimum intervention of the state in the personal life and economic affairs, plurality, and the liberal internationalism (Dworkin, 1998).

Meanwhile, neoliberals argues that individuals must take responsibility for their own economic success, claiming that the pursuit of self-interest leads to better outcomes for society as a whole. While acknowledging individuals as rational and self-interested actors, neoliberals sustain that the state can no longer fulfill its traditional role in a fundamentally transformed international environment.

Although different, these theories agree on one aspect, namely the rational nature of people, from where sprung traits such as selfishness and the pursuit of power. However, these approaches overlook the automatic and irrational responses that also constitute fundamental aspects of human nature. These responses become particularly evident during crises and disasters, prompting a different mode of thinking driven by fear of the unknown and a heightened focus on immediate needs and vulnerabilities, instead of deliberate, rational thought (Paulus David et al., 2022). As a result, existing theories struggle to adequately explain the behavior of nation-states and their governance models during crises or periods of change.

The COVID-19 pandemic and the European response to the war in Ukraine highlighted the limits of existing theories regarding the state's role in international relations. The decisions and resources allocated to tackle health crises at the national level within a highly interconnected system, followed by the delegation of decision-making power to the EU for a unified European response, called into question both states' capacity to make rational decisions during crises and their ability to provide solutions independently in a globalized world.

Middle-range theories, such as European integration theories, have sought to fill up this research gap. However, similar to the broader theories, they rely on the assumption of rational decision-making. Thus, by overlooking the influence of innate human responses, they fail to explain individual and states behavior in complex and unpredictable situations such as crises.

Beyond rational decision-making models, sociological research highlights that experiences of loneliness and social disconnection can intensify perceptions of uncertainty and vulnerability, reshaping how individuals interpret risk and respond to crisis situations. From this perspective, loneliness is not merely an individual psychological state but a socially structured condition that influences cognitive framing, emotional regulation, and trust in institutions. Consequently, heightened experiences of isolation may amplify fear-based reactions and reinforce defensive or adaptive behavioral patterns, which in turn can reverberate at the institutional level through collective attitudes and governance responses (Cioacă, 2025).

With this in mind, the present study focuses on addressing this research gap by proposing a new theoretical perspective on governance, with a specific focus on explaining states' behavior in the context of globalization and crises.

The novelty of this work lies in the introduction of adaptive governance as a theoretical framework and the natural perspective on the decision-making, offering a more comprehensive and dynamic understanding of states behavior during crises and uncertainty.

## **2. Methodology**

The study data was collected between January 1st 2007 and August 1st 2022.

The research begins with historical analysis and process tracing, employed on existing literature to observe the impact of governance habits and new governance challenges on current governance models, and identify causal links between events and states and international organizations' decisions during crises.

To observe and understand social, political, and historical conditions influencing states' behavior during crises we use context analysis. Along with this, we use content analysis for behavioral patterns and decision-making processes, and focus on counting the infringement cases initiated by the European Commission against its member states, and the areas the infringement cases were impacting the most.

Content analysis was used together with comparative and trend analysis, to observe breaches in the EU law across different fields, detect patterns in states' behavior and establish correlations between major crises and EU law violation.

## **3. European integration theories: insights and limitations**

A significant challenge in the European studies lies in explaining the governance model of the EU since the formation of the first European Communities. Scholars have developed various theories to explain EU's decision-making processes. However, these theories often concentrate on governance models during periods of stability or on instances where nation-states shift to national policies in times of crisis but none taking an integrated approach that accounts for both the dynamics of peace and the impact of crises on states' behavior.

One of the first attempts to explain the European model of governance was made by Haas in his neo-functionalist theory, focused on the formation of the European Economic Community. The theory centered on the 'spillover effect,' which he described as a domino effect in which integration in one functional area is likely to lead to integration in others (Haas, 1958: X).

Haas argued that integration and decision-making processes are influenced by both supranational and non-state actors. In his view, the European Commission is a key player in fostering European unity, along with interest groups and organizations or "any collective of individuals organized for joint action" (ibid: XXVIII) that trigger change by putting on the political agenda new topics.

Haas's theory explains the integration process and sequences of the European decision-making, but overlooks the role of the nation states. For this reason, Hoffmann introduced the intergovernmentalist theory that placed at the core of its ideas the nation states. He focused on the collective consciousness, defined as a

national feeling, which makes a group of people distinct and united in relation to others, and the so-called national situation, which is about the inheritance of cultural and identity aspects that shape the attitude of a nation towards the others (Hoffmann, 1966: 867 - 868).

Intergovernmentalism asserts that nation-states remain the primary actors in international relations, and the changes observed after the WWII are about stronger international collaboration, with states at the core of the European Communities' institutions, defending their national interests through alliances.

While the theory may have offered good explanations at that time, it faced limitations in accounting for European governance post-Maastricht Treaty, especially when EU member states began aligning their foreign policies with the Common Foreign and Security Policy (CFSP).

As a result, in 1994, the very father of intergovernmentalism wrote about a different Europe dominated by an identity crisis triggered by the economic integration and the Maastricht Treaty. Although a convinced intergovernmentalist, Hoffmann was surprised by this new Europe that managed to rewrite a totally new model of Franco-German relations (Hoffmann, 1994).

However, the EU member states did not completely or immediately align with the EU's CFSP, particularly between 1990 and 2000. During this period, Germany, Italy, the Netherlands, France, and other EU members, faced numerous accusations of pursuing their own energy interests and following a foreign policy that diverges from the Union's collective stance (Paillard, 2010; Siddi, Karajalainen and Jokela, 2022).

For this reason, in 1993, Moravcsik deepened and revived the intergovernmentalist theory by focusing on national interest and sovereignty, leading to the development of liberal intergovernmentalism. This theory is based on the concepts of rational state behavior, national preference formation, and interstate negotiation. Moravcsik argued that states make rational decisions based on their national goals by maintaining control over the decision-making (Moravcsik, 1993).

Yet, this approach fails in explaining the irrational state decisions during the COVID-19 crisis, as well as the subsequent shift in strategy, including the prioritization of a unified European foreign response to the Ukraine war over national energy interests (European Union, 2022). Additionally, while liberal intergovernmentalism posits that national decisions stem from rational institutional choices (Moravcsik and Schimmelfennig, 2018), it fails to explain states' return back to national politics during economic crises in an interconnected economic system.

To explain the unitary position of the European states in politics Sidjanski proposed a federalist approach and placed the European Commission at the center of the federal construct. This optimistic vision of the European project highlighted the innovative and unitary aspects of the idea of a federation of national states by Jacques Delors (Sidjanski, 2001). However, the structure of the European decision-making system, particularly the role of the Council of Ministers, dispels the notion of a true European federation.

Close to federalism we have the functionalism. The key distinction between these two lies in their organizational models. While federalism tends to be a closed and exclusive decision-making system, Mitrany's functionalism offers an open model where new members can be seamlessly integrated into the political and administrative framework without conflict or coercion (Lavenex, Križić and Veuthey,

2021). With all this, because it primarily focuses on the technical aspects of cooperation and overlooks the political dynamics and the role of national interests, it fails to fully explain shifts in governance or decision-making processes during periods of instability or when national and supranational interests diverge.

To address this gap, the theory of European governance emerged, conceptualizing multi-level governance as a model of shared sovereignty, in which decision-making power is decentralized and involves a range of actors, including the EU, nation-states, interest groups, organizations, and European citizens. It discusses about hierarchical governance in several areas (Tömmel, 2016) but fails to account for irrational decision-making and shifts in priorities. The theory lacks a comprehensive framework for understanding governance dynamics in periods of instability and global crises.

While existing theories provide valuable insights into governance, they fall short in explaining the irrational states' decisions during crises. These theories typically focus on rational decision-making and fail to account for the unpredictable and emotional aspects molding states' behavior in times of crisis. To address this gap, we introduce the theory of adaptive governance, which integrates both rational and irrational factors to offer a more comprehensive understanding of states' behavior during crises.

#### **4. A natural approach to the European governance**

Governance is a process that operates according to a set of rules, but it is fundamentally based on a much more complex thought process. Despite all factors and variables that influence human thinking, it seems that in certain situations people register a pattern of behavior. Thus, to understand governance, we have to look first at the human brain and see how decisions are made at the individual and group level in moments of peace and during crises.

##### **4.1 The neurobiological implications**

The human brain primarily operates in two states during the thought-action process. The first state is the alarmed one, where the brain seeks quick solutions for survival and danger avoidance. The second state is a secure and calm state of mind, allowing the brain to think critically, create logical connections, and solve problems.

Because governance is a complex process requiring deep thought, creating connections, and a high level of conscience, it has to take place in the second state of mind, in which decisions must be taken logically while considering the risks and the benefits for guaranteeing social welfare. But things happen differently during crises.

All sensory information we receive - whether visual, auditory, tactile, or olfactory - is initially transmitted to the brain's sensory processing areas and then sent to the amygdala, which plays a central role in processing emotional responses, particularly fear. The amygdala evaluates incoming stimuli, particularly those related to potential threats, and influences decision-making, prioritizing physical security and survival.

Thus, for survival purposes, all incoming sensory information first passes through the amygdala, which is described as "the central system of fear responsible for both conditioned and unconditioned fear" (Davis, 1997: 382). Only after the initial processing information reaches the prefrontal cortex, responsible for conscious thought and decision-making. However, this sequence does not guarantee that fear



will not influence thoughts and decisions. In situations that require immediate action for survival, conscious responses may be delayed, with the amygdala triggering an immediate reaction before the prefrontal cortex has time to intervene.

Thus, there are situations in which we respond with subconscious, automatic reactions through 'subcortical routes' (Sato, 2008), and other situations in which we make conscious decisions when we are calm and capable of engaging in complex thought processes. These help us differentiate between three types of decision-making: automatic, conscious, and mixed, that are based on the nature of the impulses and the brain regions involved in processing them.

The amygdala plays a key role in processing all information related to emotional responses. It does not generate responses directly, but it triggers commands for other relevant brain regions that are responsible for formulating appropriate reactions. And depending on the nature of the impulse and how the amygdala processes it, our brain may or may not make conscious or partially conscious decisions.

Most decisions, however, are made by the unconscious mind, often accompanied by an illusion of free will. The conscious typically becomes involved only after a process has been repeated enough times, with the best actions reinforced and rewarded by the limbic system (Bignetti, 2020). Yet, how frequently are the factors generating crises consistent enough across contexts to allow for transferable or standardized responses? While national-level strategies may appear effective, such approaches often fall short in an increasingly interconnected and interdependent world.

#### **4.2 The role of fear in governance logic**

Focused on the impact of fear on decision-making and governance, Von Neuman and Morgenstern laid the foundations of the expected utility theory. They started from the premise that people are rational, and that during crisis or catastrophes, government decisions will be rational in spite of any fear and uncertainty. In response to this, Chanel and Chichilinski (2009) did an experiment in which they showed that 52% of their study participants made irrational decisions regarding hypothetical situations of catastrophic events. The authors found that fear makes people focus excessively on the catastrophe and as a response their decisions lack rationality.

Similarly, Kohn studied the impact of fear on the decision-making in economy, and observed that fear and irrationality rise from the unknown, which reign in times of crises. Crises and mass changes build new impulses and situations with unknown impact which raise a feeling of fear considering the uncertainty of results. Thus, during financial crises there is the pressure of not taking a bad decision that can cause an economic disruption. This pressure for not making it worse, makes people focus excessively on the crisis and live in fear. From this moment on, people act very cautiously and take safe decisions, which are often irrational, (Kohn, 2005).

Another aspect worth mentioning is the intensity of crises, which is able to transform change and fear into normality. This makes it even harder to solve efficiently a crisis, especially when it is impossible to keep up with the information fully updated. Practically, our decisions are always based on a reality about to change. For this reason, a government cannot cope perfectly with the challenges of a crisis.

However, national institutions should develop in order to respond better to crises, and not only train for avoiding them (ibid.).

In the case of national governments, people from the state institutions follow a set of rules and protocols to avoid human subjectivity. Still, the governance remains human, giving to people the capacity to act based on their instinct and life experience. This is why institutions are equally impacted by the fear and uncertainty of a crisis, being nothing more than a reflection of individual decision-making, embodying the concerns, fears, and needs of all the individuals working within the and those they represent.

### **4.3 Human nature in decision making**

People are curious by nature, yet instinctively avoid danger and unknown. The reason behind this behavior is the simple survival instinct. Once we find a course of events that resembles something we encountered before, we tend to apply methods that were effective in the past for avoiding or solving a situation that threatened our security. Consequently, during crises our decisions are influenced by the fear of going through the unknown, pushing us towards solutions we tried before, although not efficient. This happens because biologically "the human model of organization is to lessen the uncertainty and randomness that individuals, social groups, nation states and cultures constantly encounter" (Aarelaid-Tart, 2010).

Thus, we instinctively become resistant to novelty. This behavior is called uncertainty avoidance (UA) (Frijns et al., 2013) and is classified as normal human behavior with the purpose of self-preservation and survival, and is substantial in influencing governance. To understand how this manifests, we examine social behavior during the COVID-19 crisis.

A first example in this direction is the moment during the pandemic when people began stockpiling food. This phenomenon occurred in multiple countries, with excessive purchasing leading to inflation and temporary disappearance of certain products from store shelves. The outcome of these decisions reinforced fears and established irrational patterns of behavior for future crises.

In such situations, people expect governing institutions to make logical decisions. However, it is well-known that nation-states tend to revert to national policies, primarily because "ambiguity and uncertainty exists rather in international relations and transactions between international affairs than in domestic affairs and local transactions" (Shenkar, 2001). Moreover, the tendency to avoid uncertainty is closely linked to loyalty towards local actors (Stranghan and Albers-Hiller, 2001) and traditional solutions. Consequently, this desire to minimize uncertainty that leads states and their actors to return to old principles and values, which can hinder innovation within firms (Shenkar and Zeira, 1992), described the behavior of the European states, creating one more crisis in the history of the European cooperation and unity.

The states' efforts to avoid uncertainty prompts state institutions to rely on traditional organizational models and refuse new technological tools to solve problems. In these contexts, uncertainty is also associated with innovation (Kedia and Bghart, 1989, apud Venaik and Brewer, 2010).

In practical terms, uncertainty, refers to the inability to predict future events, shaping in us the fear of the unknown. This fear arises when we reflect on past events

and compare them to present circumstances, but it sharpens when we don't know what is to come. Our initial response is to take preventive measures aimed at averting potential risks or harm (Aarelaid-Tart, 2010), with the goal of reducing the likelihood of bad events occurring in the present.

Thus, fear and uncertainty define social and individual behavior. At the individual level, uncertainties make us worry about the future and ask anxious questions about when and how we will suffer or die. And at the social level, uncertainties make us wonder what kind of risks can prevent the continuity of a certain socio-cultural action (ibid.). So, out of the desire to avoid crises, danger, or problems, when we recognize a potential pattern of events that triggers fear, we tend to adopt what we perceive as the safest solutions. These solutions are often familiar rather than effective or optimal options.

Whether decisions are made individually or collectively, fear plays a crucial role in shaping our choices, especially when it is shared within a group. This influence is easy to observe during crises, where fear can drive responses that prioritize immediate safety over long-term rationality.

### **5. Defining adaptive governance**

In an increasingly interconnected world, the ability of states and institutions to adapt to crises and uncertainty is crucial. In this light, adaptive governance is a framework that seeks to understand how state behavior evolves in response to both external and internal pressures. Our theory focuses on the influence of human instincts, emotions, and reflexivity, and argues that governance is not merely a product of strategic planning but also a reflection of the natural, instinctive, psychological and emotional states of the society it serves.

In this regard, we introduce the concept of adaptive governance - also referred to as 'governance of convenience' - to more accurately capture states' behavior within the contemporary international system and evolving governance models.

We define adaptive governance as a dynamic model of governance in which decision-making authority shifts between two principal centers of power: the nation-state and supranational structures, particularly in the context of the EU. This oscillation is primarily driven by the instinctual desire of both states and institutions to ensure their survival, responding to both internal and external pressures.

Thus, adaptive governance is a model of governance that focuses on institutional survival.

The foundational principle of this governance model lies in the ongoing tension between stability and the influence of fear, which has the potential to distort decision-making processes, leading to irrational choices that prioritize survival over long-term planning. In contrast, complex and strategic thinking thrives in environments of peace and stability, where there is sufficient capacity for reflective thought. Thus, only in stable times, governments and institutions prioritize easily sustainability and long-term goals, while during crises the decision-making models shift to align more with natural and instinctual patterns of thinking and action.

The adaptive governance theory looks at the nation-state through the framework of human instincts, focusing on the symmetry in the behaviors of individuals, institutions, and states during times of crisis and uncertainty. States and

institutions mirror and adapt the emotional and behavioral responses of the society they govern. These behaviors are not just top-down but are shaped by the collective instincts of individuals. As a result, fear within the population may lead to defensive, protective policies by the state.

In this regard, adaptive governance refers to real-time policy adjustments made in response to crises, balancing immediate needs with long-term survival strategies. This process involves both resistance to novelty and openness to new approaches, driven by the continuous testing of strategic efficacy. Governance, is not only about adapting for optimal outcomes, but rather navigating the inherent decision-making process to identify the most appropriate response to a crisis. This process usually follows a pattern: initial reliance on established methods, exploration of alternative approaches, identification of the most efficient solution, and transforming these solutions into preferred strategies to be implemented first in future crises.

Then, when discussing institutional reflexivity, we also speak about the similarity between individual, institutional and state behavior. Considering the human nature, we believe that emotional states and instincts of individuals are reflected in state responses. Consequently, understanding individual and group psychology can help predict institutional and state behaviors in times of crises.

Lastly, adaptive governance stresses the need to balance crisis management with long-term stability in governance. It is only through an understanding of human nature - recognizing it as an integral part of our decision-making processes - that more effective and resilient governance strategies can be developed. Acknowledging the instinctual drives that influence both individuals and institutions enables policymakers to craft adaptive strategies that not only respond to immediate crises but also lay the foundation for sustained stability and long-term success.

Understanding contemporary governance models requires an analysis of both long-standing governance traditions and emerging supranational frameworks. Historically, we observe that at the beginning of crises, states prefer to operate within familiar frameworks, as this fosters a sense of control when certain things align with established knowledge. However, panic and anxiety emerge when the traditional methods of governance fail to propose effective solutions, requiring fundamental transformations in the decision-making. This highlights a feeling of lost control, inducing fear among individuals who struggle to foresee future outcomes (Arafat et al, 2020). For this reason, in times of change and crises, power shifts are easy to observe, because people lean towards going back to the old ways for more control (Abdala, Alarabi and Hendawi, 2021). And only after these prove to be ineffective, people turn towards new solutions.

In light of this, new ideas often require proving their efficacy multiple times to gain acceptance over the old ones (Cheng and Weinberg, 2024). This is why the supranational model of governance is accepted only after a repeated success of the supranational solutions. The more frequently nationalist approaches fail to address crises, while supranational responses prove effective, the quicker supranational governance is accepted within the governance practices. Nevertheless, we cannot overlook the significant imprint that national governance has left on the human psyche and the long-standing traditions it has built. To replace it, supranational

governance must demonstrate its efficiency across a wide range of life domains, convincing us to move beyond national governance.

Resistance to novelty is a well-known reaction, especially during crises. It underpins several theories, including the loss aversion, status quo bias, neophobia, cognitive comfort theory, expected utility theory, and the backlash theory. All these theories align with Chen et al. (2017) ideas on animal behavior economics, regarding the natural tendency to maximize personal losses although the gain would be with a less significant personal value. These theories share a common theme: the human desire to embrace familiar methods and situations over new, unfamiliar approaches or environments with uncertain outcomes.

Consequently, during crises, states retreat into national policies, assume control, and attempt to solve problems individually. Their solutions may also involve alliances and bilateral collaborations, as these are older and more tested than supranational governance. But in a globalized world where nothing is static, the governance strategies and models require adaptation.

Focused on resistance to unknown, Kahneman and Tversky (1979) showed the individual's difficulty to remain rational in moments of risk and crises. Their prospect theory underlines the human tendency to minimize the risk identified as unknown circumstances. The more unknown variables, the harder it becomes to assess potential outcomes. Therefore, we often choose familiar options, even if they may lead to more challenging consequences.

In the same line, Hogan and Feeney (2012) showed that the drivers of policy change favor decisions for new solutions and policies typically only after existing policies have failed. After losing credibility, facing blame for the consequences of their choices, and grappling with the fear of losing decision-making power, institutions and states become desperate for alternatives that might help repair the damage and "reinstate their former power as capacity" (Mansbridge and Shames, 2008: 627). Only within this context states adopt previously unconsidered solutions. A similar process happened to the EU member states during the COVID-19 pandemic, when they initially attempted to address the crisis independently before agreeing to delegate decision-making authority to the EU. The same pattern emerged in response to the Ukraine crisis, where a national approach was initially pursued.

This problem-solving approach often reflects a desire to address issues independently while shifting blame for failures onto others. In the European context, national representatives frequently direct their discourse and efforts toward supranational institutions, a tradition of shifting blame to European bodies for anti-populist decisions, policies, or political actions (Schlipphak and Treib, 2017) that may irritate the electorate, while claiming credit for the successful ones.

In this light, adaptive governance describes a governance of convenience, where nation-states retain decision-making power and attempt to solve problems using traditional methods. And when these approaches fail, they transfer authority to supranational bodies for crisis management. This process mirrors individual reactions to crises, where the instinct to control and apply familiar methods is driven by the need for a sense of mastery. However, when old methods prove ineffective, new approaches are explored.

## **6. The dual nature of the European governance**

The dual character of the European governance is present in the underlying principles, procedures, and Treaties that shape the functioning of the Union. The tension between these two models is not only conceptual but also manifests in the day-to-day operations of governance and policy-making.

### **The European governance by decision-making procedures and principles**

The European decision-making reflects the national model, meaning the dialogue between legislative (European Parliament and the EU Council) and executive institutions (European Commission). However, the European decision-making does not stop at the Commission's actions, and it never intended to do so because of two reasons: 1. The European Union never wanted to take over the executive power from the nation states, because for a policy to be effective it must be adapted to national needs, traditions and working ways. 2. The nation states as political bodies never accepted the full transfer of power to the EU as a new construct they did not trust. Consequently, to this moment the nation states are involved directly in the European legislative process in the first reading of normative acts through a procedure called “the cards” but also through national representatives in the European institutions, where the members represent their national political positions (European Parliament, 2022).

In this context, European governance is about decisional competencies: exclusive, shared and supportive. The first type gives to EU the right to govern free of constraints in areas like “customs union, competition, monetary policy, marine biological resources, common commercial policy, conclusion of international agreements under certain conditions” (Eur-Lex, 2016). The shared competencies refer to areas of governance jointly managed by the EU and nation-states, covering 13 specific areas. And the supporting competences emphasize a governance model where decision-making power rests with the nation-states, and EU playing a supportive role in policy development in areas such as health, industry, culture, tourism, education, civil rights, and administrative cooperation.

EU's exclusive competencies overlap with shared domains like consumer protection, energy, freedom, security and justice, research, agriculture, economic cohesion, social policy, and the internal market. So, whenever EU seeks to alter a field in which it has shared or supporting competencies, it can initiate changes in areas where it holds exclusive competencies. For this reason, much of the EU governance turns back to subjects like consumer protection and internal market (Eur-Lex, 2016).

### **The European governance by treaties**

The Article 50 of the EU Treaty, emphasizes that nation states are the ‘masters of the treaties’ entitled to take at any moment the decision to withdraw from the Union based on national constitutional principles (European Parliament, 2016) - a decision the United Kingdom made in 2020. Meanwhile, member states navigate a mixed model of governance.

On the other side, the Lisbon Treaty empowers the supranational model of governance. For example, Article 2 of the Treaty on European Union emphasizes the principles of democracy, rule of law, and respect for human rights, which are central

to European governance and decision-making. Complementary to this, the Article 7 comes as an EU mechanism for verifying, ensuring member states' compliance, and possibly sanction potential breaches (European Union, 2012).

Then, we have the Article 5 from the Treaty on the EU emphasizing the principles of proportionality and subsidiarity. The second highlights the limits of EU actions while authorizing the Union to engage in areas where it has only shared or supporting competencies. This demonstrates the balance of power within the European Union and how the transfer of the decision-making authority is formalized in the EU treaties.

An example of adaptive governance in the EU occurred during the COVID-19 pandemic, which impacted two areas where nation-states hold exclusive competencies: health and tourism. After initially managing these sectors independently, the nation states transferred to EU the power to manage the crisis through recommendations and regulations. An outcome of EU's involvement was the introduction of the digital green certificate (European Commission, 2021), which affected both tourism and health, among other domains. This example illustrates a governance of convenience. However, to fully grasp the dynamics of adaptive governance, we turn to a deeper analysis of how fear and uncertainty, triggered by crises, influenced European decision-making and shaped the behavior of the EU and its members between 2007 and 2022.

### **6.1 Methods of measurement**

We start with the data collection on infringement cases initiated by the EU against its member states for violating European law in areas of justice, fundamental rights and citizenship, and employment, social affairs and equal opportunities between January 1st 2007 and August 1st 2022. The study data was collected by using the European Commission site, where search filters were applied on policy area. These policies are directly related to the principles and values of the Union and prove the EU members' commitment to the European project through compliance, or their shift towards national policies and reluctance to the EU, by engaging in European law violations. This helps us track states' behavior during crises.

Given that each state reacts differently to change, we normalize the collected data in the sense of establishing a reference value per country based on the infringement cases from the years without crises and big change in the EU.

Then, we identify the major crises and change that may have caused fear and insecurity among nation states in the established period and compare them with the collected data on EU infringement cases to observe variations in behavior when overlapping the charts. In this sense, we build two graphs to illustrate the peaks of violation of the European law in the chosen areas and overlap them with the biggest changes and crises the EU went through between 2007 and 2022.

For data collection and organization, we used Microsoft Excell, and for visualization we used Microsoft Word features.

## 7. Results and analysis

The Eurosceptic discourse gained strength during 2007 - 2008 economic and financial crisis. Then, it seemed that the Eurosceptic discourse was mostly characteristic to the Eastern European members. Yet, our data shows that both the states with an official Eurosceptic discourse and those at the helm of Europe have a relatively equal tendency to violate the European law during crises (see Table 1).

**Table 1.** Infringement cases in EU between January 1<sup>st</sup> 2007 and August 1<sup>st</sup> 2022 on justice, fundamental rights and citizenship

|      | PL | GR | HU | DE | IT | FR | AT | BE | DK | EE | ES | PT | GB | SE | FI | CZ | CY | IE | LV  | LT | LU | MT | NL | SK | SI | BG | RO | HR |   |
|------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-----|----|----|----|----|----|----|----|----|----|---|
| 2007 | 2  | 2  | 2  | 2  | 2  | 4  | 5  | 1  | 2  | 2  | 0  | 2  | 4  | 5  | 2  | 1  | 2  | 2  | 3   | 3  | 0  | 3  | 3  | 1  | 2  | 2  | 6  |    |   |
| 2008 | 1  | 1  | 0  | 0  | 1  | 1  | 0  | 0  | 0  | 1  | 0  | 1  | 1  | 0  | 0  | 2  | 1  | 1  | 1   | 0  | 0  | 1  | 0  | 1  | 0  | 0  | 1  |    |   |
| 2009 | 3  | 1  | 1  | 0  | 0  | 2  | 1  | 1  | 2  | 0  | 2  | 0  | 0  | 1  | 1  | 0  | 1  | 0  | 1.1 | 0  | 0  | 2  | 0  | 0  | 0  | 1  | 0  | 0  |   |
| 2010 | 1  | 0  | 1  | 1  | 0  | 0  | 0  | 1  | 0  | 0  | 0  | 0  | 0  | 0  | 1  | 0  | 1  | 1  | 0   | 0  | 0  | 0  | 0  | 0  | 0  | 0  | 0  |    |   |
| 2011 | 3  | 2  | 4  | 4  | 5  | 2  | 3  | 4  | 1  | 2  | 3  | 2  | 5  | 3  | 3  | 5  | 4  | 2  | 1   | 4  | 5  | 5  | 2  | 4  | 2  | 3  | 2  |    |   |
| 2012 | 1  | 1  | 2  | 0  | 3  | 2  | 2  | 2  | 0  | 0  | 0  | 1  | 1  | 1  | 0  | 2  | 1  | 0  | 1   | 0  | 0  | 1  | 1  | 1  | 0  | 2  | 2  |    |   |
| 2013 | 2  | 2  | 1  | 0  | 3  | 0  | 2  | 1  | 0  | 0  | 2  | 1  | 1  | 0  | 2  | 0  | 2  | 1  | 1   | 2  | 2  | 1  | 1  | 3  | 2  | 1  | 1  |    |   |
| 2014 | 3  | 2  | 1  | 1  | 2  | 2  | 1  | 2  | 2  | 0  | 4  | 2  | 0  | 1  | 2  | 4  | 2  | 1  | 1   | 1  | 2  | 2  | 1  | 5  | 4  | 3  | 4  |    |   |
| 2015 | 1  | 1  | 0  | 2  | 0  | 2  | 0  | 2  | 2  | 1  | 1  | 1  | 0  | 3  | 2  | 3  | 2  | 1  | 1   | 3  | 1  | 1  | 0  | 3  | 2  | 1  | 1  | 2  |   |
| 2016 | 1  | 2  | 3  | 0  | 0  | 1  | 2  | 3  | 0  | 0  | 3  | 1  | 0  | 1  | 1  | 1  | 3  | 2  | 1   | 1  | 3  | 1  | 2  | 2  | 1  | 2  | 2  | 1  |   |
| 2017 | 2  | 2  | 3  | 1  | 0  | 1  | 2  | 0  | 1  | 0  | 2  | 1  | 1  | 1  | 0  | 1  | 2  | 0  | 0   | 0  | 2  | 1  | 0  | 2  | 1  | 2  | 0  | 2  |   |
| 2018 | 3  | 3  | 1  | 0  | 1  | 1  | 2  | 1  | 0  | 1  | 3  | 1  | 1  | 2  | 3  | 2  | 2  | 2  | 2   | 2  | 3  | 2  | 1  | 2  | 2  | 3  | 4  | 2  |   |
| 2019 | 3  | 5  | 1  | 5  | 3  | 4  | 3  | 2  | 0  | 3  | 3  | 2  | 0  | 1  | 0  | 4  | 3  | 6  | 0   | 0  | 2  | 5  | 2  | 0  | 1  | 6  | 3  | 2  |   |
| 2020 | 3  | 1  | 2  | 0  | 2  | 3  | 1  | 0  | 1  | 2  | 1  | 1  | 1  | 0  | 0  | 2  | 3  | 2  | 1   | 2  | 0  | 2  | 1  | 2  | 1  | 3  | 1  | 1  |   |
| 2021 | 6  | 8  | 5  | 4  | 4  | 4  | 2  | 7  | 0  | 5  | 3  | 10 |    | 6  | 6  | 4  | 4  | 3  | 6   | 3  | 5  | 5  | 5  | 3  | 2  | 3  | 3  | 4  | 4 |
| 2022 | 2  | 3  | 2  | 3  | 2  | 2  | 2  | 3  | 1  | 3  | 1  | 2  |    | 3  | 3  | 2  | 3  | 2  | 2   | 1  | 3  | 2  | 3  | 3  | 5  | 3  | 3  | 2  |   |

Source: Author's table

Although the public discourse raised expectations of more infringements to be registered by the Eastern European countries, we found that Greece, Portugal, Belgium and others often register more violations in the studied areas of European law than Poland and Hungary.

Then, we look further at the violation rates of EU law in the area of justice, fundamental rights and citizenship between January 1<sup>st</sup> 2007 and August 1<sup>st</sup> 2022 (See Figure 1).

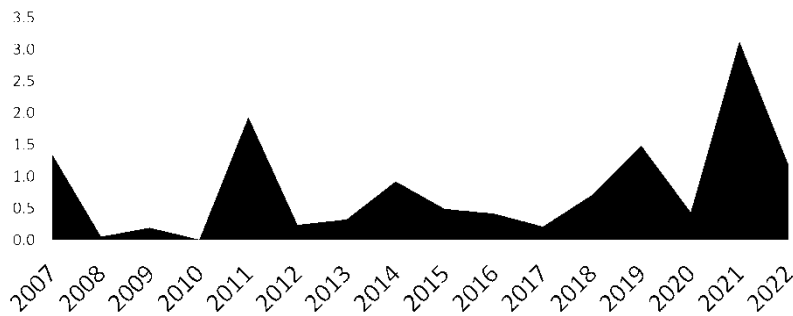


**Figure 1.** EU members' breakage of the EU law on justice, fundamental rights and citizenship between January 1<sup>st</sup> 2007 and August 1<sup>st</sup> 2022

Source: Author's figure



The infringement cases highlight two first picks in EU law violation caused by the 2007-2008 economic and financial crisis, and the 2007 EU enlargement towards Romania and Bulgaria. We correlate these reactions by observing the subjects of EU law violations, which contour across topics like gender equality, equal treatment between people of different race and ethnic origins, voting rights for citizens residing in a member state other than their own, and the freedom of movement for workers and their families.

This situation unfolded in the context of Romania and Bulgaria having the largest Roma populations at the time of their EU accession (30% in Romania and 12.2% in Bulgaria). In these countries, Roma employment rates were significantly lower than the EU average (Lecerf, 2024).

Another wave of infringement cases emerged in 2011, following the “contagion phenomenon” (Constâncio, 2012). The excessive focus of nation-states on overcoming the crisis led them to breaching European law on environmental protection, consumer rights, and the mediation of civil and commercial disputes.

Three years later, the Crimean crisis triggered further violations of EU law on unfair commercial practices, consumer protection, the right to information in criminal proceedings, and more.

In 2019 the peak of European law violation is related to the closest economic crisis, the 2018 - 2019 Turkish currency debt and crisis and the excessive market stock reaction to the USA - China trade war. In this light we find more infringement cases on market abuse and fight against fraud.

And the biggest infringement peak was in 2021 during the COVID-19 crisis, where most cases were on security matters and digital content directive (EU) 2019/770.

By analyzing the infringement cases during the years, we observe that crises pushed the states towards the old ways of doing things, that did not align with EU law. To fight this, in 2018 the Council of the EU adopted the Decision 2018/1993 on the EU integrated political crisis response arrangements that pushes the EU members to adopt a common and coordinated response to crises affecting Europe (Council of the EU, 2018).

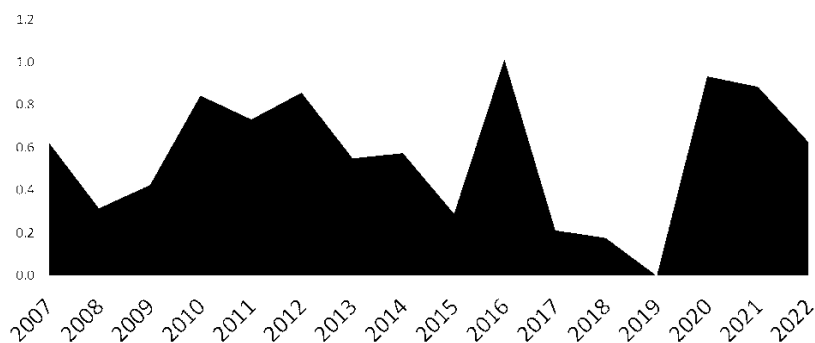


**Figure 2.** EU members’ breakeage of the EU law on employment, social affairs and equal opportunities between January 1st 2007 and August 1st 2022

*Source:* Author’s figure

Then, we also have the area of employment, social affairs and equal opportunities showing relatively similar responses of the states during crises (see Figure 2).

The first reaction in this area was in 2007 after the EU enlargement towards Bulgaria and Romania and the economic crisis. The enlargement brought changes in the EU decision-making, since Romania became the EU's 7th largest country.

To mitigate the changes, EU formulated the directive 2006/15/CE regarding the right to information and consultation of employees in the undertakings and community groups regarding the upcoming enlargement. Still, it did not produce the desired effect given the breaches of EU law in this domain.

Later, we witness two events: the great recession after the 2007-2008 economic crisis and the beginning of the Syrian crisis that caused a peak in EU law violation between 2009 and 2012. Both crises had an impact on EU governance and the behavior of nation states that translated in discriminatory financial aid to foreign students, restricted freedom of movement for workers and their families, lack of communication and lack of attention for work safety.

In 2014 the Crimean crisis prevented the infringement cases from dropping, and in 2016 the Syrian conflict awakened states resistance to immigration, triggering breaches of EU law on restricted free movement of workers and their families, and the minimum health and safety requirements.

In 2021, the peak of EU law violations is caused by the COVID-19 crisis. The law breaches were on workers' protection from carcinogen and mutagen agents, health safety in working environments with chemicals, the free movement of workers, and the inclusion of SARS-Cov-2 on the list of biological agents known to infect humans.

In both policy areas the nation states registered more violations of the EU law in areas linked to the domains affected the most by crises. The nations' response showed the inertial return to the old ways of doing things in the detriment of the newly assumed policies. The data exemplifies the core principles of adaptive governance, where states adopt instinctual actions and adjust their decision-making mechanisms to individual and social responses to manage crises and ensure institutional survival.

## **8. Conclusions**

This study started from the existing theories of governance, international relations and European integration on states responses during crises. By highlighting the limited focus of the existent approaches on the role of natural and automated instinctive human responses during crises on the human capacity to think and decide rationally, the study focused on examining how natural reactions impact decision-making processes and the models of governance during moments of crises and uncertainty.

By exploring the human cognitive mechanisms and natural responses to fear and uncertainty, this paper proposed the adaptive governance theory that accounts for rational tendencies of individuals, automatic reactions to crisis-induced triggers, and the adaptive learned responses.

This approach allowed us to analyze the sequence of state reactions in crisis situations and identifying key patterns such as: 1) institutional and state reflexivity;

2) behavioral symmetry across individuals, institutions, and states; 3) decision-making driven by fear and survival instincts; and 4) adaptive behaviors, characterized by emergent actions that continuously evolve through natural learning mechanisms.

Starting from this, we analyzed the European model of governance between 2007 and 2022. The findings reveal that during major crises, EU member states exhibited a higher frequency of legal breaches compared to periods of stability. Moreover, as the intensity of crises increased, the inertia in violating EU law persisted.

The COVID-19 pandemic and the war in Ukraine served as examples of how adaptive governance manifests at the EU level. During both crises, there is a governance inertia and a newly learned governance response.

Based on the findings of this study and the inertial behavior of nation-states during crises and significant change, we suggest that for a faster adaptation to the adaptive model of governance for the policy makers to consider: the potential impact of natural automated reactions on the decision-making; the natural response of individuals and the necessity to build easy to grasp solutions; and to work on raising awareness and improving the human response to uncertainty and fear.

### Data Availability

The research data used for this study is available at: 10.6084/m9.figshare.26348770

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## **Critical Engagement Through Digital Storytelling: The Power Of Reflective Narratives**

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### **Abstract:**

This paper examines the contribution of digital storytelling (DST) to critical engagement and reflective learning in higher-level EFL learning, in line with the focus on learner-centered and higher-order cognitive approaches to second language learning. Over a span of three weeks, eleven C1-level participants from the Intensive Language Teaching Center (ILTC) at the University of Chadli Bendjedid – El Tarf were asked to produce original digital stories on matters of personal or public concern, such as identity, environmental issues, and societal transformations. Learners made use of accessible digital tools, such as Canva and Adobe Express, to combine text, images, voiceovers, and music in creating well-developed stories in which language use and higher-order cognitive processes were integrated cohesively. Data were obtained through learner journals and classroom observations, with a focus on critical thinking skills, including analysis, evaluation, and synthesis. Evidence indicates that learners were highly engaged with the topics, explored personal ideas, and confidently expressed themselves in English to communicate argumentative and expressive perspectives. Planning, scripting, and editing stages allowed participants to reflect their personal voices on complex societal issues. Even though the program was short-term, the evidence suggests that DST is an effective tool for developing both linguistic and higher-order cognitive skills. Incorporating images, voiceovers, and music helped create an environment where students actively participated in self-directed learning in second language contexts. This research contributes to the growing body of literature demonstrating DST as an effective strategy for fostering critical literacy in EFL contexts.

**Keywords:** *Digital Storytelling; Critical Thinking; EFL Learners; Multimodal Learning; Reflective Practice.*

### **1. Introduction**

In the last two decades, however, EFL instruction has come to realize increasingly that attention to grammar and lexis is not enough. Students must also develop cognitive abilities that enable them to question texts, build arguments, and make judgments in English (Paul & Elder, 2019; Facione, 2020). In the majority of EFL classrooms, however, attention continues to be given to controlled exercises and teacher-led instruction with little space for genuine reflection or student voice (Alwehaibi, 2020; Benraghda et al., 2022). This disconnect often leaves students capable of doing discrete language tasks but not engaging profoundly and cognitively in higher-level thinking and working together in English (Benraghda, 2024).

Digital storytelling (DST) is one of the methodologies that most likely will close the gap. DST invites students to author and share brief multimedia stories consisting of text, images, audio, and occasionally video (Robin, 2016). Planning, scripting, media choice, revising, and narrating are imbued with meaning, representation, and audience selection. These replicatory choices are reflective and analytical, making DST an effective tool for developing critical thinking (Sadik, 2020). DST, in EFL environments, has been associated with increased motivation (Abdel-Hack & Helwa, 2014), enhanced writing and narrative skills (Aleml et al., 2022; Cheng, 2022), and increased multimodal literacy development (Gregori-Signes, 2014). A recent mixed-methods study demonstrated that the traditional versus digital storytelling experiment improved writing ability and increased motivation in students (Ajabshir et al., 2024).

Nonetheless, while DST literature is growing, its own use in critical thinking in EFL contexts is underdeveloped. Most research focuses on motivation, writing acquisition, or technology affordances, rather than on how DST construes analytical, evaluative, and synthetic thinking. Short-term interventions (e.g., several weeks) and such interventions carried out in under-researched geographical or institutional contexts are also sparsely researched. The Algerian EFL context is particularly undercovered.

This study tries to fill this gap by investigating how DST can facilitate evidence of critical thinking analysis, synthesis, and evaluation among higher-level EFL university students within a short, intensive project. More precisely, it asks:

1. What is the impact of a short DST project on learners' depth of participation, questioning assumptions, and capacity for synthesis and evaluation?
2. How do multimodal design decisions (image, sound, narration) propel the design of learners' use of language, reflection, and agency?

The following sections provide applicable literature, introduce the design approach, present results, discuss implications, and conclude on pedagogic implications and future research areas.

## **2. Literature Review**

### **2.1 Critical Thinking in Language Learning**

Critical thinking is generally defined as the capacity to analyze, evaluate, and synthesize information to make informed decisions (Facione, 2020). In language learning, critical thinking allows learners to cope with uncertainty, assess sources, and construct arguments in the target language (Wallace, 2018). To facilitate critical thinking, activities need to push students beyond literal comprehension and get them to question, justify, and consider multiple perspectives

(Atkinson, 2019; Mushtaq & Benraghda, 2018). Demands like testing, big classes, and scripted curricula are bound to limit teachers from designing these activities (Alwehaibi, 2020).



## **2.2.Digital Storytelling: Definition and Educational Promise**

Digital storytelling is made up of brief multimedia tales, 2 to 5 minutes, created from narrative text, image, audio voiceover, sound effects, and sometimes video (Lambert, 2013; Robin, 2016). Its pedagogical strength is multimodal density: students must orchestrate meaning across modes and make semiotic decisions regarding how to best represent ideas (Kress & van Leeuwen, 2021). Research demonstrates that DST facilitates learner engagement, collaboration, and more profound thinking (Hung, Hwang, & Huang, 2020; Sadik, 2020).

In language learning classrooms, DST has also been used for developing writing ability, speaking ability, and narrative ability. Alemi et al., 2022, for instance, found that young EFL students improved in writing quality and motivation after a long-term DST intervention. DST's prioritization of learner voice and identity is also aligned with multimodal literacy frameworks (Gregori-Signes, 2014).

## **2.3 Digital Storytelling and Critical Thinking**

Most DST research deals with surface skills (motivation, speaking, writing), but some do deal with the link to critical thinking also. Abdel-Hack and Helwa (2014) reported a quasi-experiment with statistically significant development in narrative writing and critical thinking when EFL majors were treated with DST and weblogs for a semester. Yoon (2022) reported improvement in inference and argumentation capacity in university EFL learners after a storytelling treatment. Bilici et al., 2024 instructed secondary school learners through collaborative DST and reported positive effects on disposition toward critical thinking, achievement, and narrative capacity. Their results suggest that group DST can support co-regulation and critical thinking of subject matter (e.g., biology). DST's narrative structure leads students to position themselves rhetorically, compare evidentiary claims, and justify media choices—all synthesis and evaluation tasks (Bilici et al., 2024).

A recent pilot study by Sapan (2024) involving college students in reading-writing classes found that digital storytelling improved critical thinking, creativity, and comprehension. These results suggest that even small-scale DST initiatives can promote higher-order thinking.

## **2.2 Theoretical Lenses: Multimodal and Narrative Thinking**

In order to see how DST can facilitate critical thinking, the theory of multimodal learning can be applied. Meaning is made by intermodal coordination (linguistic, visual, auditory) and negotiated as learners choose and integrate modes (Kress & van Leeuwen, 2021; Miller, 2020). Media editing (e.g., altering an image or voiceover) demands metacognitive noticing and justification, and these are key aspects of critical thinking.

Narrative theory is also illuminating: narrative integrates event, causality, and perspective within a coherent totality. In narrative writing, students determine the kind of focalization, temporality, and agency to employ. Such choices are frequently a matter of weighing evidence in contention or polyphony,

and consequently giving rise to critical thinking (Bruner, 1991). DST has students integrate narrative and media choice in a bid to unite rhetorical and semiotic consideration. Therefore, DST is at an intersection of multimodal literacy and narrative reasoning that provides it with particular affordances for engaging EFL students' analytic, evaluative, and synthetic modes of thinking.

### **2.3 Rationale and Gaps for Current Study**

In spite of compelling theoretical and empirical justification, gaps exist. Most DST studies are carried out over a period of some weeks or a whole semester; few examine brief, intensive interventions. There are not many in non-Western university EFL settings, and even fewer targeting advanced learners (C1 level). Moreover, most target output (speech, writing) and not thought behind the output. The current research bridges these gaps by investigating whether and how a three-week DST project in an Algerian university setting can foster critical thinking, learner reflection, and increased linguistic variety production.

## **3. Methodology**

### **3.1 Research Design**

The research employs a qualitative, interpretive action research design to examine participants' sense-making and engagement with digital storytelling in real time (Agra, 2025). Learners' experiences, reflection, and observable changes in thought, rather than statistical generalizability, are prioritized.

### **3.2 Participants and Context**

This study was conducted at the University of Chadli Bendjedid – El Tarf's Intensive Language Teaching Center (ILTC), Algeria. Eleven students (eight female, three male), aged 20–25, enrolled in a C1-level course, volunteered to participate in the project. All participants were generally digitally literate, familiar with simple graphic editors and voice recording, but had no prior experience creating complete multimedia narratives.

### **3.3. Intervention / Task Design**

Over a period of three weeks, each student made a personal digital narrative (3–5 minutes) on an individual or social issue, e.g., identity transformation, environmental concern, or cultural change. Scaffolds in teaching consisted of:

- Introduction session on narrative design, multimodal design principles, and example narratives
- Idea generation workshops, storyboarding, peer feedback, scriptwriting (System, 2024).
- Technical sessions in Canva, Adobe Express, voice recording, image sourcing, and transition
- Revision cycles where students re-made visuals, narration, and pacing
- Class final presentations, followed by reflection

Students were consciously asked to reflect on the ways that each media element added to meaning (e.g., "Why this image? Why this background music?").

### 3.3 Data Collection

Two primary sources of data were collected:

1. **Reflective Journals:** Students produced journal entries at the conclusion of every class outlining their decision-making processes, challenges, insights, and shifts in thoughts regarding their story.

2. **Observations in the Classroom:** The researcher-maintained field notes for all sessions and observed trends in discussion, scaffolding interactions, and indicators of critical dialogue (e.g., students questioning or debating choices).

Furthermore, the digital artifacts themselves (*story scripts, storyboards, media versions*) were seen as secondary evidence, though not analyzed quantitatively.

### 3.4 Data Analysis

Data were analyzed using thematic analysis following Braun & Clarke (2019) guidelines. A deductive (from critical thinking cues: analysis, evaluation, synthesis) and inductive (emergent) coding scheme was followed (Mannion & Lontas, 2025). Observation notes and journal entries were coded. Triangulation with data sources and member checking (student checking themes) was utilized for credibility establishment. Reflexive memos tracked researcher bias and decisions.

### 3.5 Trustworthiness and Ethics

To enhance trustworthiness (Lincoln & Guba, 1985), the study applied triangulation, member checking, and audit trails. A reflexive journal was maintained by the researcher to capture positionality and choices. Ethical permission was sought from the ILTC research committee; participants gave written consent; data were anonymized and stored safely.

## 4. Results

Results are reported in five superordinate themes, each explaining how DST encouraged learners to think more deeply, reflect, and employ more expressive language.

### 1 Immersion in Topic and Deep Engagement

Journaling demonstrated that students were deeply involved with investigation and research (Agra, 2025). One of them expressed:

"I spent hours searching for photographs and checking up on facts; when I replaced the photo, I liked the subtlety of what I was doing."

Observation notes confirm extensive levels of peer interaction for evidence, metaphor, and narrative coherence. Such peer interaction suggests students have passed the stages of superficial planning to analytical thinking. The cyclical media selections suggest they were not simply arranging content but negotiating meaning.

### 2 Questioning Assumptions and Perspective-Taking

Some participants used their stories to overturn local norms. In a waste management story, a student compared city and countryside plastic discarding

attitudes, countering the assumption that individual action is powerless. Another composed a personal journey story on bilingual identity, considering conflicts between global identities and local practices. These stories demonstrate evaluative thought: students weighed competing positions, overcame stereotypes, and revised earlier assumptions (System, 2024).

### 3 Expressive, Argumentative Use of Language

Student journals frequently use the terms hedging, contrastive conjunctions, and modal verbs to render claims more qualified (e.g., "may," "might," "however"). An example entry:

*"I revised my voiceover to utter 'some may say' instead of 'everyone knows', I thought it softened the claim and allowed for argument."*

Witnesses discussed classes where students debated the deliberateness of wording for voiceover compared to other pictures. This shows learners not only negotiating content, but also rhetorical stance (Mannion & Lontas, 2025). Their language became more "argumentative English," not merely narrative description.

### 4 Metacognitive Awareness and Revision

In revision drafts, students redesigned media, meaning pacing, narration tone, and sequence. A student first used stark black-and-white images in order to achieve contrast, but later switched to soft gradient transitions upon realizing that harsh images distracted the viewers. Journal:

*"I re-recorded the narration after hearing from classmates; my tone was too harsh, overpowering the message."*

These are syntheses bringing together narrative, media, and audience response. Students were consistently figuring out how each added up to meaning, evolving in consequence (Agra, 2025).

### 5 Constraints and Variability

Despite these promising indications, some constraints occurred. A couple of students struggled with audio editing or image placement due to limited technical skills (System, 2024). Time pressures towards the end session compressed some to reduce the depth of revision. Diversity emerged: some were strong in evaluative thinking but not as effective at synthesizing full-length stories; others employed more narrative than media choice. Nevertheless, all submitted completed projects and analyzed their work positively.

Combined, the themes indicate that DST elicited more than aesthetic production: students were engaging in analytic, judgmental, and synthesizing thought in refining their use of the English language.

## 5. Discussion

### 5.1 DST as a Scaffold for Critical Thinking

The results support earlier studies (Yoon, 2022; Bilici et al., 2024) on the use of DST as an intellectual scaffold for deeper-level thinking. Planning and revising cycles signal exercises in critical thinking: students analyze source material, judge competing representations, and construct narrative media work.

Image choice, narration adaptation, and segment reorganization forced learners to justify semiotic and rhetorical choices, acts of synthesis, and appraisal.

## 5.2 Producing Learner Voice and Autonomy

DST provided control over form and content, both augmenting their voice and a sense of ownership (Gregori-Signes, 2014). Social and personal subjects promoted more intensive meaning-making than obligatory stimuli. This aligns with constructivist philosophy: students as proactive meaning constructors, not passive consumers.

## 5.3 Language Use and Critical Discourse

This shift to argumentative, hedged, and qualified language can push students toward critical discourse. While the typical task typically demands descriptive or narrative production, the rhetorical demands of storytelling, anticipating the audience, and balancing claim and evidence nudge language use in more challenging directions.

## 5.4 Pedagogical Implications

The study identifies pedagogy to teach:

- **Scaffolding is critical:** introductory modeling, storyboarding templates, and facilitated peer review support students in maintaining their focus on significant decisions rather than technology (Agra, 2025).
  - **Option for strategic topic choice:** socially conflicted themes (culture, environment, identity) promote thinking.
  - **Revision period:** revision cycles are at the center of more profound thinking.
  - **Mixed appraisal:** integrate measures of reasoning, coherence, and use of the media with linguistic accuracy.
- Even short DST interventions can be effective with strategic scaffolding and support.

## 5.5 Challenges and Recommendations

Time constraints and asynchronous digital capability were challenges. In future designs, pairing or small-group DST could share workload and produce collective assessment. Mini-tutorials in audio editing or image selection can reduce technical resistance (System, 2024). Allocating additional project time or conducting hybrid (in-class + homework) sessions could facilitate more reflective thinking.

## 5.6 Theoretical Contribution

This study advances DST theory by situating it securely within multimodal and critical thinking in EFL. It illustrates how narrative and media choice are sites of deliberation and integration (Mannion & Lontas, 2025). The Algerian context broadens the DST literature into more under-researched contexts, showing that short, targeted projects can be as effective at providing cognitive advantage in even low-resource contexts.

## 6. Conclusion

In this study, the potential of Digital Storytelling (DST) in enhancing critical thinking skills of high-level EFL learners was examined. The evidence from journal writing and observation demonstrates that DST has the potential of enhancing critical thinking skills of learners regarding the development of an exploratory process (Sapan, 2024), overcoming biases (Yu & Wang, 2025), emphasizing complex expression (Agra, 2025), and performing revision and reflection (Aleml, Salmani Givi & Rezanejad, 2022). The technological issues and time factor restricted some learners from going deeper; however, the overall impact suggests that DST can be an effective educational tool in enhancing critical literacy and autonomy (Bilici et al., 2024).

Limitations include a small sample, a short time period, qualitative, self-report data, and the need for control or comparison groups, larger populations, longitudinal designs, and peer review of the digital artifact. Examining collaborative DST might also more equitably distribute cognitive load and welcome dialogic thinking (Yu & Wang, 2025). Natively, narrative + multimodality is a way to educate students not only to employ English but also to think in it (Agra, 2025; Aleml, Salmani Givi, & Rezanejad, 2022).

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## **Digital Media And Its Relationship To Cyber Warfare: A Study Of Strategies And Repercussions**

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### **Abstract:**

Cyber warfare represents one of the most pressing challenges confronting contemporary societies, given the complexity of defining its legal nature and determining international liabilities arising from it. The issue becomes more acute when cyberattacks are used to achieve political or military objectives, as states increasingly employ them to influence conflict outcomes and reshape global power dynamics. Modern technology has thus become a key instrument of warfare in cyberspace, commonly referred to as "cyber warfare." This study aims to analyze the relationship between digital media and cyber warfare, viewing digital media as a strategic tool in managing modern conflicts and shaping public perception. Employing a descriptive-analytical approach, the research systematically reviews recent literature and applied studies, focusing on the use of digital media in cyber conflicts as a central variable in contemporary security transformations. Findings reveal a major shift in the nature of security threats, with cyber warfare posing strategic risks to both national security and social cohesion. Moreover, digital media platforms are found to facilitate disinformation, manipulation of public discourse, and attacks on critical infrastructures. The study recommends developing integrated national cybersecurity systems, enhancing digital media literacy, and establishing effective mechanisms to counter disinformation and mitigate the multidimensional repercussions of cyber warfare.

**Keywords:** *Cyber warfare; Digital media; Cybersecurity; Disinformation; Media.*

### **1. Introduction**

In the era of rapid technological transformation, warfare has transcended the boundaries of traditional battlefields, evolving into new domains driven by digital media and its advanced communication technologies. This transformation represents an inevitable outcome of the continuous developments in information and communication technology (ICT), which have given rise to new forms of conflict that exceed the classical conception of war. These new forms are characterized by greater complexity and multidimensionality encompassing technical, informational, psychological, and social dimensions. (Feldman, 2003: 15)

Within this evolving landscape, cyber warfare has emerged as one of the most significant and sophisticated manifestations of contemporary conflict. Cyber threats have become among the most pressing security challenges of the twenty-first century, as they enable the targeting of national infrastructures, the theft of sensitive data, and the manipulation of public perception through disinformation

and rumor propagation. Through the strategic employment of digital media and advanced communication technologies, cyber warfare has gained the capacity to destabilize nations internally and compromise their sovereignty. Digital media, once perceived merely as a tool for communication and information exchange, has thus transformed into a strategic instrument leveraged in the pursuit of political, military, and economic objectives. (Dahmani & Brada, 2025: 130)

Consequently, the interplay between digital media and cyber warfare stands as one of the most striking indicators of the transformation in the nature of modern international conflicts. This interplay integrates technological dimensions with psychological and social mechanisms, forming a complex and evolving ecosystem that challenges traditional notions of power and security. Understanding this dynamic phenomenon requires a comprehensive analytical approach that addresses its concepts, mechanisms, strategies, and implications for both national and global stability.

Contemporary sociological approaches increasingly emphasize resilience as a key dimension in understanding how individuals and communities respond to uncertainty, crises, and structural transformations. The concept of social resilience refers to the capacity of individuals and social groups to mobilize internal and external resources in order to adapt, maintain social functioning, and mitigate the negative effects of disruptive events. Research on urban populations highlights that resilience is not merely an individual psychological trait but a socially embedded process shaped by institutional support, social networks, access to services, and cultural capital (Otovescu et al., 2015). In this perspective, resilience becomes closely connected to broader discussions on social protection, governance, and the safeguarding of fundamental rights, as resilient communities are better equipped to preserve social cohesion and uphold democratic values in times of crisis. Thus, integrating resilience into sociological analyses contributes to a deeper understanding of how contemporary societies navigate risk, inequality, and rapid social change while maintaining collective stability and well-being (Otovescu et al., 2015).

Accordingly, the present study seeks to examine the strategic role of digital media in the execution and management of cyber warfare, while analyzing the communicative and technological strategies employed within this framework. It further aims to assess the security and social repercussions of these practices on states and societies. The central research question guiding this investigation is therefore formulated as follows: How is digital media employed as a strategic tool in cyber warfare, and what are its principal security and social impacts within the context of contemporary conflicts?

## **2. The Concept of Digital Media**

The notion of digital media emerged in the late 1980s as a contemporary term used to denote the profound transformation that reshaped the media and communication landscape in comparison with previous eras. This domain has evolved into a distinctly new sphere no longer confined to a specific sector or component within the communication system although the pace and depth of this transformation have varied across media forms, ranging from print and photography to television and advanced communication technologies. (Dahmani &

Brada, 2025: 141)

While the media have always undergone continuous technological, institutional, and cultural evolution, the paradigm shift that began in the latter half of the twentieth century required a clear distinction from earlier developmental phases. This transformation transcended the media themselves to encompass far reaching social and cultural changes that had begun in the 1960s and continued thereafter. Among the most significant of these transformations is the transition from the digital age to the age of artificial intelligence an evolution that seeks to capture the depth of structural and systemic changes affecting societies and economies alike, along with the cultural reconfigurations that have rendered the media one of the most visible indicators and embodiments of these changes. (Dewdney & Ride, 2013: 42)

Scientific and technological advancements have also been central to this transformation, effectively erasing traditional national boundaries in domains such as commerce, corporate governance, and even in customs, cultures, identities, and belief systems. Media have served as both a vehicle and a catalyst for this global convergence. Simultaneously, societies have shifted from the industrial age to the information age a transition that has fundamentally redefined labor, skills, investment, and profit structures. This evolution replaced the focus on material production with an emphasis on information- and service-oriented industries. Within this new configuration, the media have functioned not only as agents of transformation but also as products of it. (Athique, 2013: 10)

Consequently, digital media should be understood as an integral component of the broader matrix of social, technological, and cultural transformations that characterize contemporary societies. In essence, it represents a new technological culture one that mirrors the ethos of the modern era. Nevertheless, scholars have not reached a unified definition of digital media. Many contend that the term generally refers to interactive digital platforms that enable two-way communication and rely on forms of digital computation. This distinguishes them from traditional media such as the telephone, radio, or television that, in their original forms, operated independently of computing technologies, even though they have subsequently been enhanced by them. (Coudry, 2012: 58)

In a related sense, digital media are often conceptualized as the fusion of traditional media with computer and data storage technologies, giving rise to a new communicative environment characterized by interactivity, flexibility, and integration. Hence, digital media encompass the convergence of text, sound, digital video, interactive multimedia, virtual reality, and internet-based technologies such as email, online chat, smartphones, tablets, and computer applications indeed, all sources of information accessible through digital interfaces. Ultimately, digital media represent the reconfiguration of traditional media into new formats enabled by digital technology. All contemporary media, therefore, may be regarded as traditional media that have undergone digital transformation.

### **3. The Concept of Cyber Warfare**

The advent of the internet as a global communication network has profoundly reshaped numerous concepts within the humanities, fundamentally

altering the nature of social interactions as well as international and interpersonal relations. The digital realm has evolved into a complex and dynamic environment that has generated new forms of conflict, stemming from the rapid transition of physical societies into fully integrated digital ones. (Lindsay, 2013: 370)

Within this context, the term “cyber” emerged derived from the Greek word *kybernetes*, meaning steersman or governor, which later came to denote concepts of “control” and “remote command.” Today, the prefix cyber- is broadly used to refer to all phenomena associated with computer networks, the internet, and digital environments, encompassing interactive applications and platforms such as Facebook, WhatsApp, and others. The inherent danger of cyberspace lies in its potential for illicit exploitation namely, the manipulation or destruction of information sources and data through digital systems and networks. This capacity for disruption and destruction constitutes the core of what is now referred to as cyber warfare. (Robinson et al., 2015: 72)

Cyber warfare can be defined as a form of virtual aggression conducted through computer technologies with the objective of disrupting or incapacitating the digital infrastructure of a state or organization. Such acts often target critical or sensitive information systems for strategic, political, or military purposes. More comprehensively, cyber warfare encompasses any politically motivated digital assault directed against an adversary's electronic devices, networks, or information systems, with the intent to paralyze or compromise its financial, administrative, or security infrastructures. These actions may involve infiltrating, altering, or destroying confidential databases, thereby undermining networks, websites, and essential public or private services. (Krepinevich, 2012: 44)

Cyberattacks thus constitute the operational backbone of cyber warfare. States employ them as instruments to weaken, influence, or destabilize an opponent's information systems while simultaneously defending their own. Under the framework of international humanitarian law, cyberattacks are classified as acts of warfare when they form part of an armed conflict either offensively or defensively and when they cause casualties, material damage, or significant disruption. This includes cyber operations designed to interfere with or destroy communication and information systems on a national or transnational scale. The United Nations Security Council has affirmed that the use of computers or digital means by a state either directly or with explicit or implicit consent to target another state or its assets constitutes a threat to international peace and security. This applies especially to acts involving unauthorized access, interception, or destruction of data, as well as the creation or dissemination of digital tools intended to disrupt the internal stability or activities of states. (Janczewski & Colarik, 2007: 115)

In essence, cyber warfare is intrinsically linked to cyberattacks conducted by military or paramilitary actors aiming to inflict damage upon systems dependent on the internet through data theft, sabotage of electronic infrastructures, or large-scale disruption of digital services. It represents a digital extension of conventional warfare, one that blurs the lines between civilian and military domains. Fundamentally, it is a war of intellect and information, waged with the intent to dismantle an adversary's scientific, technological, and informational foundations. Manifestations of cyber warfare include the disruption

of communication between military units and their command centers, the weakening of transportation and logistics networks, the targeting of economic systems, and the manipulation of technical or digital content each a testament to the evolving sophistication of contemporary conflict in cyberspace.

#### **4. Characteristics and Effects of Cyber Warfare**

Cyber warfare represents one of the most complex and sophisticated forms of contemporary conflict. Unlike traditional warfare, it is distinguished by its unique characteristics and its profound repercussions on both national and international levels. It constitutes a form of technologically advanced warfare fundamentally grounded in the internet an ever-evolving network whose methods, mechanisms, and tools of engagement continuously transform. Given its direct connection to the vital interests of states, cyberspace has become a strategic arena for conflict, where operations often yield far-reaching consequences for critical infrastructure and national security. (Schmitt, 2014: 270)

A defining feature of cyber warfare is speed. The higher the velocity of data transmission across networks, the greater the flexibility and efficiency of cyberattacks in breaching defense systems. This dynamic grants cyber aggressors a decisive advantage, allowing them to infiltrate and exploit systems more effectively than defenders can respond. Moreover, cyberattacks are characterized by their stealth and agility, which render them exceedingly difficult to detect, trace, or counter. Their impact is not confined to conventional battlefields; rather, their reach extends to sovereign targets deep within nations disrupting critical infrastructures such as energy grids, financial systems, communication networks, and government databases. (Cornish et al., 2010: 21)

Another defining challenge lies in the inadequacy of traditional international laws and legal frameworks to effectively deter or prosecute cyber aggression. The absence of physical evidence, combined with the intangible and often transient nature of digital attacks, severely constrains attribution and accountability. Among the most prevalent forms of cyber warfare are espionage, infiltration, sabotage, and the deployment of malicious software or viruses designed to cause widespread disruption. The actors behind these operations are diverse, encompassing state and non-state entities national governments, private corporations, terrorist organizations, extremist networks, and independent hackers who may pursue political, economic, or ideological objectives. These operations are often covert, transnational, and difficult to trace to their source.

The effects of cyber warfare on social security are as extensive as those of conventional warfare but manifest in more intricate and multidimensional ways, impacting both the tangible and virtual dimensions of the digital society. (Andress & Winterfeld, 2013: 66) Its consequences can be categorized as follows:

- **Technological Dimension:** Cyber systems are highly susceptible to remote manipulation or reprogramming by hostile actors. Such breaches can render entire systems uncontrollable, leading to paralysis of critical infrastructure and posing an immediate threat to public safety and social order.
- **Humanitarian Dimension:** Unlike traditional warfare, cyberattacks cannot distinguish between civilian and military targets. The

automated nature of digital systems precludes moral or ethical discrimination, placing human users and civilian populations at equal risk of harm.

- **Economic Dimension:** Given that modern economies depend heavily on digital infrastructure, cyberattacks targeting these foundations can destabilize financial markets, disrupt trade flows, and trigger regional or global crises. Such disruptions undermine economic security and, by extension, social stability.
- **Legal Dimension:** Establishing accountability for cyberattacks remains a profound challenge due to difficulties in proving mens rea (criminal intent) and causation two essential elements in international criminal jurisprudence. This legal ambiguity impedes justice for victims and complicates the assessment of the broader social and political contexts surrounding such attacks.

In conclusion, cyber warfare constitutes a multidimensional threat to social security technological, humanitarian, economic, and legal. Each of these dimensions represents a cornerstone of societal stability and a fundamental prerequisite for safeguarding human communities in the digital era. Therefore, the urgency of developing robust surveillance mechanisms, international legal frameworks, and coordinated defensive strategies has never been greater, as humanity faces an increasingly complex array of cyber threats that transcend borders and challenge traditional conceptions of warfare and security.

## **5.Digital Media Strategies in Cyber Warfare**

### **5.1. Media and Information Disinformation**

Information disinformation has emerged as one of the most prominent and sophisticated instruments employed in both cyber and hybrid warfare. It refers to the deliberate creation and dissemination of false, misleading, or manipulated information with the intent to shape public perception, influence collective behavior, and serve political, ideological, or security objectives. Scholarly analyses emphasize that this strategy extends far beyond the mere act of “spreading lies.” It encompasses the distortion of contextual truths, the manipulation of partial facts, the fabrication of images and videos, and the algorithmic amplification of selected messages to reinforce specific narratives and agendas. (Memon & Wong, 1998: 37)

Such campaigns rely heavily on advanced digital infrastructures and technologies most notably electronic armies, bots, and political memes that are deployed to disseminate targeted messages at high velocity across multiple digital platforms. Through repetition and algorithmic reinforcement, these messages gradually acquire an illusion of legitimacy and authenticity. Research indicates that the true danger of disinformation lies not only in its capacity to propagate falsehoods but also in its ability to erode trust in traditional media institutions and official sources, thereby generating an atmosphere of uncertainty, confusion, and cognitive polarization within societies. (Carr & Hayes, 2015: 47)

In contexts of political or military tension, disinformation serves as a strategic instrument to destabilize target states, fragment social cohesion, weaken public confidence in governance structures, and manipulate international opinion

in favor of a particular cause. Accordingly, disinformation functions as a form of digital psychological warfare distinguished by its emotional resonance and its ability to exploit collective anxieties, particularly in societies characterized by fragile media ecosystems and limited digital literacy. Specialists in media security studies argue that confronting digital disinformation necessitates the implementation of comprehensive national policies, the promotion of media and digital literacy education, and the institutionalization of independent fact-checking bodies capable of monitoring, verifying, and mitigating the spread of fabricated content. (Aslam et al., 2020 : 1295)

A salient example of these dynamics can be observed in the Russian-Ukrainian war that erupted in February 2022. This conflict demonstrated the centrality of disinformation strategies within contemporary military and political operations. Various actors, most notably Russia, have employed systematic digital campaigns aimed at shaping domestic and global public opinion, legitimizing military actions, and obscuring the factual reality of events on the ground. Reports have revealed that these operations frequently relied on pro-Russian media networks, supported by thousands of fake accounts and automated bots driven by artificial intelligence, to propagate contradictory narratives regarding the origins and nature of the conflict. Such narratives included portraying Ukraine as being under so-called “Nazi influence” or as a direct threat to Russian national security, amplifying claims concerning alleged U.S. biological laboratories in Ukraine, and dismissing certain atrocities as “staged fabrications” all intended to generate confusion and promote counter-accusations. (Dahmani & Brada, 2025: 96)

Conversely, other disinformation efforts have taken the form of fabricated news reports, digitally altered images, and decontextualized video footage disseminated through platforms such as Telegram, Facebook, and TikTok. Encrypted and closed messaging groups have also been used to circulate rumors and localized misinformation, fostering panic and disorder, particularly in border regions and cities subjected to shelling.

In response, the Ukrainian government, in partnership with civil society organizations and independent media outlets, developed what has been termed a digital line of defense. This initiative involved documenting violations, disseminating counter-narratives substantiated by visual and geospatial evidence, and mobilizing global public opinion through coordinated hashtag campaigns and large-scale digital awareness programs. (Brada & Dahmani, 2024: 83)

In conclusion, disinformation should no longer be viewed as an isolated media phenomenon but rather as a tactical component embedded within the broader architecture of cyber warfare. It operates as a strategic tool for weakening adversaries, sowing internal discord, diminishing morale, and manipulating the perceptions of international audiences. This reality underscores the pressing necessity for states to develop integrated national frameworks for digital security and counter-disinformation frameworks that combine resilient media institutions with advanced technological systems capable of detecting, tracking, and neutralizing disinformation campaigns in real time.

## **5.2. Strategies of Psychological Subversion**

Digital Psychological Warfare (DPW) has emerged as one of the most sophisticated and consequential forms of asymmetric conflict in the modern digital era. This form of warfare capitalizes on technological media and digital platforms to shape perceptions, influence psychological behavior, and manipulate the morale of individuals and entire societies. Unlike conventional warfare, DPW does not rely on direct military engagement; rather, it seeks to exploit psychological and social vulnerabilities through the dissemination of content designed to evoke fear, anxiety, confusion, and social instability ultimately eroding the adversary's internal cohesion and collective morale. (Svetoka, 2016: 5)

Digital psychological operations (PsyOps) depend heavily on advanced technological infrastructures. These include the application of artificial intelligence to analyze behavioral and psychographic data, as well as micro-targeting techniques that enable the delivery of psychologically tailored messages to specific audiences based on their digital footprints. Social media platforms serve as the principal battlefield for such operations, providing fertile ground for the propagation of fake news, rumors, extremist narratives, and disinformation. Psychological research has consistently demonstrated that emotionally charged content particularly that which evokes fear, anger, or resentment spreads more rapidly and extensively than neutral or positive information. This emotional contagion effect enhances the potency of digital psychological warfare by generating immediate and large-scale reactions within online communities. (Kaplan, 2015: 198)

One of the most pernicious dimensions of DPW lies in its targeting of national symbols, sovereign institutions, and social cohesion. By eroding public trust, spreading feelings of helplessness and disenchantment, and amplifying internal divisions, these tactics weaken the psychological and moral fabric of a society. Algorithmic systems play a pivotal role in intensifying this process. Through mechanisms such as filter bubbles and echo chambers, algorithms continuously expose users to emotionally provocative and repetitive content, thereby creating cognitively closed environments that reinforce ideological biases, hinder critical reflection, and exacerbate social polarization. (Bennett & Strange, 2011: 90)

Addressing the challenges posed by digital psychological warfare requires a holistic, multidimensional response that integrates technological, educational, and sociocultural measures. Effective counterstrategies must combine robust cybersecurity frameworks with comprehensive digital media literacy initiatives aimed at enhancing citizens' critical thinking, emotional resilience, and capacity for discernment in the face of manipulative digital content. Strengthening psychological and informational resilience at both the individual and societal levels thus becomes an essential pillar of national security in the digital age ensuring that societies remain resistant to the destabilizing effects of organized psychological subversion.



### **5.3. Media Infiltration Strategies**

Media infiltration (MIS) constitutes a central tactic within the repertoire of cyber and hybrid warfare strategies. State and non-state actors deploy MIS to embed targeted narratives within domestic and international information ecosystems by systematically compromising or co-opting elements of media infrastructure. This can be accomplished through a range of methods, including the manipulation of digital news platforms, the hijacking of influential social-media accounts, and the creation of counterfeit news websites that project the appearance of legitimate sources while serving premeditated strategic agendas intended to shape public opinion. (Nissen, 2016: 133)

The strategy relies on sophisticated content-manipulation techniques, notably the intermixture of falsities with partial truths, the deployment of sensationalist headlines, and the fabrication or alteration of images and audiovisual material. Such techniques substantially increase the burden of verification for both audiences and professional media organizations, thereby facilitating the stealthy propagation of misleading narratives.

A specific modality of this phenomenon often described as media injection involves the dissemination of deceptive material via ostensibly neutral or local outlets, thereby conferring a spurious credibility to the inserted messages among target populations. Tactics of “soft hacking” are also common: local digital influencers, activists, or community figures frequently unaware of the origins or purposes of the content they share are leveraged to amplify narratives that ultimately serve external interests. The cumulative aim is to induce deliberate cognitive disorientation by saturating the digital environment with a profusion of conflicting information, producing cognitive overload that corrodes collective sense-making and diminishes the public’s capacity to discriminate between truth and falsehood. (Eun & Aßmann, 2016: 345)

The perniciousness of media infiltration stems in part from its asymmetry and the practical difficulties of detection and attribution. Digital content is decentralized, multiplatform, and inherently transnational, enabling malign campaigns to propagate beyond conventional jurisdictional boundaries. Mitigating this threat therefore requires multidimensional responses: the development and deployment of advanced monitoring and content-audit technologies; the reinforcement of societies’ digital literacy and resilience; and the cultivation of independent, transparent national media systems capable of identifying, exposing, and neutralizing covert information operations.

### **5.4. Algorithmic Manipulation Strategy**

Algorithmic manipulation (AMS) represents one of the most insidious and sophisticated instruments deployed by cyber actors in the realm of digital and hybrid warfare. This strategy functions by redirecting the circulation of information and subtly reshaping public perceptions of reality through the control and distortion of content-distribution mechanisms embedded within digital platforms most notably social media networks. (Shehabat, 2012: 2)

Contrary to the common assumption of algorithmic neutrality, empirical research demonstrates that digital algorithms are intrinsically value-laden, being programmed in accordance with commercial, political, or ideological logics that

determine what content is prioritized or marginalized. These algorithmic systems rank and recommend information based on metrics of engagement, visibility, and profitability, thus amplifying selected messages while systematically downranking others. The result is the emergence of “filter bubbles” and “echo chambers,” informational silos that confine users within homogeneous cognitive environments, reinforce preexisting beliefs, and hinder exposure to diverse or dissenting perspectives. (Dewdney & Ride, 2013: 44)

Cyber and political actors exploit these algorithmic affordances through meticulously engineered digital campaigns. By employing micro-targeting, big data analytics, and behavioral profiling, they disseminate emotionally charged, divisive, or sensationalist material designed to maximize engagement rather than truth. This process instrumentalizes the attention economy to polarize societies, deepen ideological cleavages, and steer collective behavior whether by influencing electoral outcomes, shaping public discourse, or destabilizing sociopolitical systems. (Aro, 2016: 124)

The profound danger of algorithmic manipulation lies in its opacity: users remain largely unaware that what appears to be an organic representation of reality is in fact algorithmically curated content aligned with hidden strategic objectives. This invisible governance of perception transforms algorithms into powerful instruments of psychological and informational control. (Whyte, 2020: 6)

Confronting this threat necessitates a multilayered response. First, enhancing algorithmic transparency and subjecting recommendation systems to independent auditing is essential to detect biases and manipulative tendencies. Second, accountability frameworks must be imposed on major digital platforms to ensure ethical algorithmic governance. Finally, the promotion of digital literacy and media education across societies is crucial to equip citizens with the critical competencies required to recognize, question, and resist the subtle manipulations inherent in algorithmic mediation.

## **6. The Implications of Digital Media on Cyber Warfare**

Digital media constitute the primary theatre for contemporary cyber warfare. The pervasive deployment of digital technologies has become a defining vector of vulnerability for modern publics owing to their exceptional capacity to regulate information flows, shape public opinion, and generate systemic imbalances across political and social institutions. The implications of this phenomenon can be grouped into three interrelated dimensions: security, political, and social.

### **6.1. Security implications**

The governance of information flows is now integral to notions of national cyber-sovereignty. Recent security assessments show that safeguarding informational sovereignty has become a strategic priority within national cybersecurity doctrines, enacted through measures that regulate communications and mitigate the manipulation of domestic media discourse itself a core component of national security.

Cyber operations directed at a state's information environment rank among the most effective techniques for undermining political and social stability. Such operations aim to delegitimize state narratives domestically and internationally by disseminating disinformation, sowing doubt, or otherwise eroding trust in official institutions. (Lupovici, 2011: 50)

Moreover, digital media platforms serve as vectors for sophisticated attacks on critical infrastructure including ministerial websites and portals for defense, education, health, and media organizations. Indicators from national cyber-security assessments reveal spikes in these attacks during episodes of political crisis and armed conflict, reflecting their potency in disrupting governmental functions and civic life. Attribution is frequently problematic: attacks often originate from opaque sources or loosely organized digital insurgent groups, complicating response and deterrence. (Whyte & Mazanec, 2023: 33)

Case study: The 2022 Russian–Ukrainian conflict

The conflict that escalated in February 2022 exemplifies the weaponization of cyberspace. Adversarial campaigns concentrated on the energy, telecommunications, financial services, and e-government sectors, producing both material and informational effects. Notable modalities included:

- Power-grid disruption: Use of advanced malware families such as Industroyer2 to interfere with industrial control systems, producing wide-scale outages during critical periods.
- Financial sabotage: Deployment of data-wiping malware (e.g., Hermetic Wiper) that incapacitated payment infrastructures and bank operations.
- E-government attacks and information operations: DDoS assaults and website compromises timed with intensive disinformation campaigns intended to amplify fear and distort public perception.

These instances demonstrate that cyber warfare frequently transcends narrow technical objectives; it functions strategically to undermine public confidence and destabilize societies from within.

## 6.2. Political Repercussions

Digital media and its associated technologies have emerged as new instruments of sovereignty within the management of geopolitical conflicts. They are increasingly repurposed to steer public opinion and influence the outcomes of major political events such as elections, referendums, and mass mobilizations. Empirical studies have demonstrated that coordinated digital information campaigns have been instrumental in disrupting public opinion across the United States and Europe during key electoral and policy moments, revealing the strategic use of digital ecosystems as tools of influence and manipulation.

A central mechanism of this influence is digital disinformation, which represents one of the most pervasive and insidious tools in cyber warfare. Social media networks and online news platforms are systematically employed to disseminate falsified narratives, manipulated images, and synthetic videos (so-called deepfakes) designed to distort factual realities and erode trust in official and journalistic institutions. These campaigns are engineered with algorithmic precision leveraging data analytics and behavioral profiling to privilege emotionally charged, divisive, and sensational content over accurate or balanced

reporting. (Tabansky, 2011: 76)

The result is a deliberate distortion of the information environment, producing confusion among policymakers and the public alike and impeding rational decision-making, particularly in moments of political or security crisis. This manipulation operates as a form of cognitive warfare, wherein perception itself becomes the contested domain. (Whyte, 2020: 7)

Ultimately, digital disinformation constitutes one of the gravest threats to political stability in the digital era. It erodes the foundations of political legitimacy, weakens citizens' confidence in democratic institutions, and jeopardizes national cohesion. Through organized digital strategies underpinned by artificial intelligence and machine learning, cyber actors are increasingly capable of reshaping collective perception and redefining the very boundaries of political reality.

### **6.3. Social Repercussions**

Cyber warfare has profoundly reshaped the social fabric of contemporary societies by deepening polarization and transforming digital media spaces into arenas of confrontation and ideological fragmentation. Far from serving merely as platforms for communication, digital media ecosystems now operate as amplifiers of conflict reinforcing divisive rhetoric, emotional extremism, and group antagonism. Algorithmic systems, optimized for engagement rather than accuracy, tend to prioritize controversial and inflammatory content, especially narratives touching on sensitive identity markers such as religion, ethnicity, and politics. Through deliberate and orchestrated digital campaigns, these mechanisms cultivate echo chambers that amplify homogeneous opinions while marginalizing dissenting voices, ultimately eroding public trust in official institutions and the credibility of traditional information sources. (Green, 2015: 18)

This erosion of trust extends beyond media institutions to include governmental authorities and international organizations. The public increasingly approaches information with skepticism, uncertainty, and fatigue, leading to what scholars describe as an "epistemic crisis" a situation in which the very distinction between truth and falsehood becomes blurred. As traditional media lose their status as reliable arbiters of information, unregulated digital spaces gain influence, intensifying risks to both social cohesion and political stability. The phenomenon of information overload (infodemic) further fragments collective consciousness, fuels resentment among social groups, and generates fertile conditions for the proliferation of multiple forms of violence ranging from symbolic and digital to physical acts of aggression.

Among the most vulnerable to these repercussions are children and youth, whose daily lives are deeply intertwined with digital platforms. According to a UNICEF (2022) report, this demographic is increasingly exposed to harmful digital content during cyber conflicts, including fake news, hate messages, violent imagery, and materials inciting aggression or discrimination. Algorithmic systems deliberately ensure the efficient targeting of such content to young audiences, exploiting their psychological sensitivity and digital dependence. The psychological toll is substantial manifesting in heightened anxiety, fear, sleep disorders, social withdrawal, and the escalation of cyberbullying and digital

violence, which can have long-term effects on mental health and social integration. (Cornish et al., 2010: 21)

In times of political crisis or armed conflict, the digital sphere becomes a vector for radicalization. The pervasive dissemination of extremist narratives and hate speech among young users undermines social solidarity and may lead to the normalization of hostility or the adoption of antisocial and extremist behaviors. Empirical evidence shows that exposure to harmful content among youth doubles during such periods, largely due to weakened digital monitoring systems and the chaotic multiplication of disinformation sources.

Ultimately, the systematic deployment of digital media in cyber warfare contributes to the erosion of cultural identity and the dilution of shared social values that underpin collective cohesion and moral order. The disintegration of these normative frameworks facilitates the rise of deviant behaviors, extremism, and social isolation. In this sense, digital media, when weaponized, becomes not merely a channel of communication but a structural force capable of reshaping the moral and psychological architecture of entire societies.

## **7.Conclusions**

In light of the strategies and repercussions of digital media in modern cyber warfare, as presented throughout this study, it becomes evident that the digital environment has evolved from a mere medium of information exchange into a complex, multidimensional arena of conflict. Cyber warfare now transcends traditional military boundaries to target information sovereignty, disrupt critical infrastructure, and undermine societies from within. This occurs through systematic digital disinformation, manipulation of public opinion, and the dissemination of hate speech and societal polarization, which collectively threaten the cohesion and resilience of social systems.

Furthermore, cyber warfare represents one of the most intricate and destabilizing forms of modern conflict, posing a direct threat to both political governance and social stability. Given the current trajectory of global geopolitical transformations, it is expected that such conflicts will continue to escalate in both scale and sophistication. This reality underscores the need for continuous, multidisciplinary academic engagement by researchers, policymakers, and security experts to monitor, analyze, and mitigate the evolving threats associated with cyber warfare.

Understanding the mechanisms that drive these dynamics and devising effective strategic solutions to safeguard societies from their profound repercussions require unprecedented international cooperation and a redefinition of digital sovereignty. This must be achieved while maintaining a delicate equilibrium between ensuring national security and preserving digital freedoms.

## **Recommendations**

Based on the findings of this study, the following recommendations are proposed:

- Investigate the influence of intelligent algorithms on shaping public opinion during crises and armed conflicts, particularly their role in amplifying social and political polarization. Strengthening national cybersecurity

infrastructure requires updating legislation and designing advanced preventive policies to counter both cyberattacks and disinformation campaigns during periods of instability.

- Enhance institutional preparedness by establishing specialized centers and laboratories dedicated to monitoring cyber threats, issuing early warnings, and developing digital contingency plans to protect critical infrastructure including the energy, telecommunications, media, and healthcare sectors.

- Integrate digital and media literacy into educational curricula and youth development programs to foster critical thinking skills and the ability to distinguish between accurate and misleading digital content. Such initiatives are vital to building digitally resilient societies less susceptible to manipulation, misinformation, and cyber exploitation.

- Promote ethical and professional standards among media institutions, particularly in the coverage of digital conflicts and warfare, while supporting the creation of independent digital fact-checking platforms to counter rumors and disinformation.

- Launch national and international awareness campaigns targeting vulnerable groups, especially children and adolescents, to highlight the dangers of violent and extremist digital content and to provide guidance on preventing cyberbullying and combating online hate speech.

- Support multidisciplinary academic research exploring the relationship between digital media, cyber warfare, and social repercussions. Priority should be given to empirical field studies, digital discourse analyses, and comparative research that contribute to building a deeper understanding of this phenomenon and informing evidence-based policy responses.

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## **Between Aid And Labeling: The Perspectives Of Social Services Beneficiaries**

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### **Abstract**

This article analyzes the lived experiences of social service beneficiaries, focusing on the tension between institutional support and social labeling processes. Based on qualitative research conducted between October and November 2025, in Vâlcea County, the study explores how people accessing social canteens and a night shelter perceive and negotiate their interactions with social assistance institutions. Data were collected through semi-structured interviews with adult beneficiaries, using purposive and snowball sampling strategies. The results indicate that accessing social services is experienced predominantly as a last resort, rather than as an exercise of a social right. While social canteens are mainly associated with public exposure of vulnerability and tacit compliance with institutional rules, night shelters are perceived as a more intrusive environment, characterized by a high level of control, loss of privacy and more pronounced consequences on personal identity. In both contexts, beneficiaries describe persistent concerns related to stigmatization, fear of losing access to support and the need to adopt coping strategies to protect their dignity. By bringing the perspectives of beneficiaries to the fore, the study contributes to sociological debates on stigma, conditionality in social assistance and institutional interactions, highlighting the symbolic and relational dimensions of social assistance beyond its material function. The article argues that vulnerability is not only a pre-existing condition of intervention, but is also shaped by everyday institutional practices. These results highlight the importance of integrating the experiential dimension into the sociological analysis of social assistance and the provision of social protection services.

**Keywords:** *social labeling; vulnerability; social policies; social services; beneficiaries' experience*

### **1. Introduction**

In recent decades, social services have become one of the main spaces of direct interaction between the state and citizens in situations of social vulnerability. Beyond their declared function of support and protection, these services play a central role in defining and administering social categories considered legitimate for public intervention. Current sociological studies show that access to social assistance



is a regulated and evaluative process, in which institutional norms and moral judgments contribute to defining the need as legitimate (Dwyer, 2010; Tyler, 2020).

Recent research on social policies shows a redefinition of the criteria by which vulnerability and individual responsibility are recognized within institutions. Social policies increasingly tend to condition access to support on the demonstration of behavioral and moral conformity of beneficiaries, which leads to a reconfiguration of the relationship between aid and social control (Wacquant, 2009; Dwyer & Patrick, 2021). In this context, social services become not only mechanisms of redistribution, but also instruments of social classification, through which individuals are evaluated, ranked, and labeled according to often opaque institutional criteria.

From a sociological perspective, vulnerability cannot be understood exclusively as an objective state generated by the lack of material resources. Recent research emphasizes the relational and institutional nature of vulnerability, which is produced and reinforced through the interaction with social protection systems (Chase & Walker, 2013; Patrick, 2014). In this sense, the status of beneficiary is the result of a social process of institutional recognition, which involves both access to resources and the assumption of a social identity marked by dependence and public exposure.

The literature on stigma provides an essential analytical framework for understanding these dynamics. From Goffman's (2009) classic analysis of discredited identity to contemporary developments in the concept of structural stigma, sociologists have shown that stigma is a complex social process, produced and maintained through institutions, public discourses, and administrative practices (Link & Phelan, 2001; Tyler & Slater, 2018). In the case of social services, stigma is not an accidental side effect, but can become a structural feature of the way support policies are organized and implemented.

Recent research on the experiences of beneficiaries indicates that interaction with social welfare institutions is frequently experienced as an ambivalent experience, in which material support is accompanied by feelings of shame, humiliation or symbolic depreciation (Baumberg, 2016; Patrick, 2017). These feelings are amplified in institutional contexts characterized by high public visibility and strict access rules, such as social canteens and night shelters. Such services, although essential for survival, are often associated with extreme forms of social exclusion and negative social representations of poverty (Cloe, May & Johnsen, 2011).

Social canteens and night shelters occupy a particular position in the architecture of social services, as they respond to immediate and fundamental needs, but at the same time imply the public exposure of vulnerability. Accessing these services implies the acceptance of institutional procedures that may include checks, rules of behavior, and repeated interactions with staff, all of which contribute to the construction of an institutional identity of the beneficiary (Johnsen, Fitzpatrick & Watts, 2018). In this sense, the experience of help is inseparable from the experience of evaluation and symbolic control.

The concept of street-level bureaucracy remains relevant for the analysis of these processes, underlining the central role of everyday interactions between beneficiaries and frontline workers in the effective production of social policies (Lipsky, 2010). Seemingly minor decisions, the language used, and the way rules are applied contribute to shaping the institutional experience and can significantly

influence how beneficiaries perceive their social status and relationship with the state. Recent studies show that these interactions can function both as sources of support and recognition, as well as as mechanisms for the reproduction of stigma (Watts, Fitzpatrick & Johnsen, 2018).

Despite the growing literature on social policy and stigma, beneficiaries' perspectives remain underexplored, particularly in terms of their experiences with basic needs services. Most studies focus on the regulatory framework or program evaluation, neglecting how individuals understand, negotiate, and internalize the institutional labels associated with beneficiary status (Patrick, 2017; Tyler, 2020).

From a sociological perspective, vulnerability should not be reduced to individual deficits or temporary circumstances, but rather understood as a multidimensional condition shaped by structural inequalities, economic transformations and institutional arrangements. Studies on the development of social economy models in Romania highlight how vulnerable groups emerge at the intersection of labor market exclusion, limited access to resources and institutional constraints, which reinforce patterns of marginalization and dependence (Otovescu, Cioacă & Calotă, 2019). In this framework, vulnerability becomes both a structural position and a socially constructed category, produced through policy design, administrative practices and broader socio-economic dynamics. Consequently, analyzing vulnerability requires moving beyond descriptive categorizations toward understanding the relational processes through which individuals are positioned within systems of support, regulation and social integration.

In this broader analytical framework, social policies must be understood not only as instruments of redistribution but also as mechanisms through which modern societies regulate risk, vulnerability, and social integration. Contemporary sociological literature emphasizes that social policy interventions reflect evolving governance models that attempt to balance protection, responsibility, and social cohesion in increasingly complex welfare contexts (Otovescu, 2021: 77-80). Rather than functioning solely as neutral responses to objective needs, social policies contribute to shaping normative expectations about deservingness, autonomy, and participation, thereby influencing how individuals navigate institutional environments and construct their social identities. From this perspective, welfare institutions operate simultaneously as systems of support and arenas of symbolic negotiation, where policy design, administrative practices, and professional discretion shape both access to resources and the meanings attached to vulnerability. Integrating the analysis of social policies into the study of social services therefore allows for a more comprehensive understanding of how contemporary welfare states mediate the relationship between structural inequalities and individual experiences, highlighting the dynamic interplay between protection, regulation, and social recognition (Otovescu, 2021: 77-80).

Starting from this gap, this article aims to analyze the perspectives of social service beneficiaries on experiences of help and labeling, with a specific focus on social canteens and night shelters. Through a qualitative approach centered on participants' narratives, the study aims to highlight how vulnerability is experienced, interpreted and negotiated in interaction with institutions, thus contributing to a deeper understanding of the symbolic dimension of contemporary social protection.

## **2. Research design and methodology**

The research had as its general objective to explore how beneficiaries of social services interpret and live experiences of help and labeling in the interaction with social assistance institutions. In this sense, the study aimed to analyze how beneficiaries describe accessing and using social services, perceived experiences of labeling or stigmatization, as well as how institutional rules and procedures are understood and lived in concrete contexts. Another objective of the research was to examine the strategies through which beneficiaries manage and negotiate beneficiary status within institutional interactions, especially in services aimed at satisfying basic needs.

Although the study is largely exploratory in nature, the analysis was guided by the general hypothesis that beneficiaries of social services perceive accessing institutional support as an ambivalent experience, in which material aid coexists with feelings of labeling or stigmatization. At the same time, it was assumed that repeated interaction with social assistance institutions contributes to the consolidation of a social identity associated with vulnerability and that beneficiaries develop discursive and behavioral strategies aimed at managing or diminishing the effects of labeling within these interactions.

The research used a qualitative approach, appropriate for investigating subjective experiences and signification processes associated with interaction with social services. The main research method was the semi-structured interview, which allowed for in-depth exploration of the participants' narratives, while maintaining a common thematic framework. The interviews were oriented towards the concrete experiences of the beneficiaries, the way they perceive institutional rules and the meanings attributed to the beneficiary status.

The research was conducted between October and November 2025, in Vâlcea County, in social canteens and a night shelter. The interviews were conducted face-to-face, in spaces that ensured the confidentiality and comfort of the participants.

The sample was formed through a combination of purposive sampling and snowball sampling, an appropriate strategy for accessing social groups that are difficult to reach through probabilistic methods. Initially, participants were intentionally selected from among the beneficiaries of social canteens and night shelters in Vâlcea County, based on their direct experience of using social services. Subsequently, some of the participants facilitated the identification of other respondents in similar situations, thus contributing to the expansion of the sample.

The final sample included 20 adult beneficiaries, over 18 years of age, who were using or had recently used the mentioned services and who had had at least two interactions with the respective institutions. The selection aimed to ensure a diversity of experiences according to gender, age and type of service used, without aiming for statistical representativeness, but rather for the analytical relevance of the collected data.

The participants did not consent to audio recording of the interviews. Under these circumstances, data were collected by taking detailed notes of the responses during and immediately after the interviews, while respecting the fidelity of the wording used by the respondents. This methodological option was adopted to respect the preferences of the participants and to reduce any potential discomfort associated with the research process.

The research was conducted in compliance with the fundamental ethical principles applicable to sociological research with human participants, especially in contexts involving people in situations of social vulnerability. The research approach was based on respect for autonomy, dignity and confidentiality, as well as the avoidance of any form of coercion or harm to the participants.

Participation in the study was voluntary, and informed consent was obtained prior to the interviews, after participants were provided with clear information regarding the purpose of the research, the nature of participation, and the use of the collected data. It was explicitly emphasized that refusal to participate or withdrawal from the study did not and could not have had consequences on access to social services.

The identity of the participants was protected by complete anonymization of the data, and in the results section, speech fragments are presented as quotes coded by initials, to prevent any possibility of identification.

The research was designed and conducted in a way that minimized the relational imbalances inherent in institutional interactions and ensured a framework for dialogue that allowed for the free expression of participants' experiences.

### 3. Results

The participants' speeches outline the entry into social services as a moment of biographical rupture, experienced not as access to a right, but as a form of capitulation in the face of the lack of alternatives. The beneficiaries insist on the idea that institutional help is not chosen, but accepted under duress, after exhausting all other options perceived as legitimate: *"You don't get here if you have anything else. When you come, it means you have nowhere else to go."* (PS); *"I pulled myself together as much as I could. When I came, it was clear that I couldn't do it alone anymore."* (MO).

These formulations suggest the existence of a moral threshold for accessing help, beyond which beneficiaries feel they have lost their autonomy. Entering the system is thus associated with a sense of personal failure and the need to justify this decision, both to oneself and to others. Help is discursively legitimized as temporary and necessary, not as an expression of assumed dependency.

In the case of social canteens, the experience of aid is marked by a constant tension between the immediate usefulness of the service and the negative social meanings associated with its use. Beneficiaries describe the canteen as an indispensable space for survival, but which makes vulnerability visible in a way that is difficult to manage: *"Food keeps you on your feet. But standing in line... that weighs you down."* (ID); *"It's not that someone is offending you. It's that they see you."* (CP).

Public exposure appears as a central element of the experience, even in the absence of explicit stigmatizing interactions. Beneficiaries anticipate the gaze of others and internalize social evaluation, which transforms accessing aid into an emotionally charged act. The canteen is not only a place of food distribution, but a symbolic space in which social differences are confirmed and lived bodily, through expectation, positioning and visibility:

*"When you go in there, you know you're not an ordinary person anymore."* (AV).

This formulation indicates a deep internalization of social hierarchies, in which beneficiary status is perceived as a deviation from social normality.

Reporting to institutional rules constitutes a central dimension of the experience in social canteens. Although the rules are rarely openly challenged, they generate a climate of caution and self-control, which shapes the behaviors of beneficiaries: *"You don't come to ask questions. You take what is there and leave."* (DC); *"If you make noise, people know about you. And that's not good."* (LM).

Beyond the formal rules, the discourses indicate the existence of a set of informal norms, implicitly transmitted between beneficiaries, that define "acceptable" behavior. Silence and discretion become coping strategies, designed to minimize the risk of exclusion. This compliance is not the result of explicit constraint, but of a constant anticipation of negative consequences: *"It is better to remain silent than to go without food."* (RI).

Thus, institutional aid is perceived as fragile and conditional, and beneficiaries internalize the responsibility not to disrupt the institutional order.

In the experiences of the beneficiaries of the night shelter, support is associated with a much higher level of institutional control. Participants describe the shelter as a space where not only access, but also daily life is strictly regulated: *"Here you don't do what you want anymore. Everything is according to schedule."* (GP); *"You don't have anything of your own. Even the bed is not sure to be the same tomorrow."* (SM).

The lack of privacy and the instability of personal space are experienced as forms of loss of autonomy, which deeply affect the sense of safety. Beneficiaries describe the shelter not only as a place to rest, but as an environment in which they are constantly exposed to the gaze and presence of others: *"I sleep with my eyes open. You don't know who is next to you."* (NR).

This everyday vulnerability suggests that shelter functions simultaneously as a protective mechanism and as a space of social insecurity.

The status of being a beneficiary of the night shelter is associated with a social label perceived as deeply derogatory. Participants describe how this label influences social relationships and self-image: *"When I hear that you are staying in the shelter, that's it, you are a nobody."* (VC); *"The world no longer sees you as a normal person."* (TD).

These fragments indicate a reduction of identity to institutional status, in which personal past and other social roles become irrelevant. For some participants, this labeling is internalized, affecting expectations about the future and the ability to imagine alternatives: *"You come to believe what others say about you."* (MR).

Interaction with staff is described as a decisive factor in shaping the institutional experience. Beneficiaries make clear distinctions between employees perceived as empathetic and those considered distant or authoritarian: *"There are some who greet you, ask you what you are doing. That matters."* (ED); *"They act as if they are scolding you."* (AM).

The unpredictability of these interactions amplifies the feeling of insecurity, as the experience of help becomes dependent on people, not on clear and predictable rules: *"It depends on who you meet. Today it's good, tomorrow it's not."* (CS).

A cross-cutting theme in all interviews is the persistent fear of losing access to services. This fear shapes behaviors and limits the expression of grievances: *"Be careful. You can be kicked out at any time."* (IM); *"Don't say anything, don't ask for anything. Don't let it get to you."* (PD).

Aid is perceived as reversible and conditional, which generates an asymmetrical relationship between beneficiaries and institutions, in which silence and compliance become survival strategies.

Despite the constraints, beneficiaries develop symbolic strategies to protect their dignity and personal identity. These include demarcating themselves from other beneficiaries and emphasizing a different past: *“I don’t belong here. I worked, I had a house.”* (LR); *“I don’t want to stay here. Only until I get up.”* (DM).

Such discourses function as mechanisms of identity resistance, allowing beneficiaries to maintain a distinction between themselves and the institutional label, even in conditions of heightened vulnerability.

#### 4. Discussions

The results of this study highlight the deeply ambivalent nature of the experience of social service beneficiaries, confirming that institutional help is not experienced exclusively as support, but as a complex social experience, marked by symbolic vulnerability, control and identity negotiation. The qualitative analysis showed that interaction with social services generates processes that go beyond the material dimension of the intervention and affect the way individuals relate to themselves and their social position.

A first central element that emerges from the results is the way in which accessing social services is experienced as a last resort, not as the exercise of a social right. This finding is in line with the sociological literature that emphasizes the persistence of a moral dimension in social assistance policies and practices, in which beneficiaries are implicitly encouraged to perceive themselves as responsible for their own situation (Dwyer, 2010; Patrick, 2017). Accepting help thus appears as a decision loaded with moral meanings, requiring justification and identity delimitation.

Experiences in social canteens indicate that stigma is not produced exclusively through explicit interactions or hostile attitudes, but is often the result of exposure of vulnerability in institutional settings. Queuing, waiting, and public exposure function as symbolic mechanisms through which beneficiary status is made visible and, implicitly, evaluable. This type of “silent” stigmatization aligns with Goffman’s (1963) analyses, which show that stigma is produced not only through discourse, but also through social contexts that mark difference.

At the same time, the results show that institutional rules and the anticipation of sanctions play a key role in shaping beneficiaries’ behaviors. The tacit compliance and self-censorship observed among participants can be interpreted through the lens of the literature on frontline bureaucracy, which highlights how everyday interactions with institutions shape the concrete experience of social policies (Lipsky, 2010). Aid is perceived as fragile and reversible, which reinforces asymmetric relationships and limits beneficiaries’ ability to claim their rights.

The differences between social canteens and night shelters are relevant not only in terms of intensity of experience, but also as a distinct type of institutional relationship. While in the case of canteens vulnerability is mainly exposed publicly, in the night shelter it is deeply managed and controlled. The loss of privacy, the strict regulation of daily life and constant surveillance contribute to what the literature describes as forms of social control exercised through protective services (Johnsen,

Fitzpatrick & Watts, 2018). Thus, the shelter appears as a paradoxical space, which offers material protection but intensifies symbolic and identity vulnerability.

A particularly relevant aspect is the way institutional labeling is internalized by night shelter beneficiaries. The results indicate that administrative status can become a dominant social identity, reducing the biographical complexity of individuals to a single institutional category. This process is part of contemporary approaches that conceptualize stigma as a structural phenomenon, generated and sustained through institutions and administrative practices, not just through individual attitudes (Link & Phelan, 2001; Tyler & Slater, 2018).

At the same time, the study highlights that beneficiaries are not passive actors in these processes. Strategies of demarcation, invoking a different past or emphasizing the temporary nature of the current situation can be interpreted as forms of symbolic resistance, through which individuals try to protect their dignity and limit the impact of labeling. Such strategies have also been documented in other qualitative research on poverty and social exclusion, which highlights the capacity of actors to negotiate the meanings attributed to vulnerability (Paugam, 1995; Patrick, 2017).

## **5. Conclusions**

The present study analyzed the experiences of social service beneficiaries from the perspective of the tension between the support provided and the labeling processes associated with their use. By focusing on social canteens and night shelters, the research allowed for a detailed exploration of how vulnerability is experienced and negotiated in concrete institutional contexts, bringing to the fore the symbolic dimension of social assistance beyond its material function.

The results show that accessing social services is perceived predominantly as a last resort, not as an exercise of a right, which significantly influences the relationship of beneficiaries with institutions. The differences identified between social canteens and night shelter highlight not only variations in the intensity of support, but also distinct forms of institutional relationship, with different effects on the daily experience and on the way in which beneficiaries construct and negotiate their social identity.

From a theoretical perspective, the analysis supports approaches that conceptualize stigma as a structural phenomenon, produced and maintained through institutional practices and daily administrative interactions, and not just through individual attitudes. At the same time, the study highlights the capacity of beneficiaries to develop symbolic strategies to protect dignity and limit the impact of labeling, underlining the dynamic nature of vulnerability as a social experience.

The implications of this study are relevant for sociological research on social services, suggesting the need for increased attention to the experiential dimension of institutional interventions, especially in services aimed at satisfying basic needs. In this sense, the results indicate the importance of analyzing not only access to resources, but also how institutional rules, procedures and interactions shape the relationship of beneficiaries with social protection systems.

At the same time, the research presents limitations related to the sample size and the specificity of the analyzed context, which restrict the possibility of generalizing the results. These limitations, however, open relevant directions for

future research, which could comparatively explore the experiences of beneficiaries in other types of social services or in different geographical contexts, as well as through longitudinal approaches that capture the evolution of the relationship between individuals and social assistance institutions.

Through the approach centered on the perspective of beneficiaries and the differentiated analysis of institutional contexts, the study achieves its objective of contributing to a more nuanced understanding of the relationship between aid and labeling, highlighting the complexity of the experience of vulnerability within contemporary social services.

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## The Need For Awareness Of The Rights Of Persons With Disabilities

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### **Abstract:**

The research aims to analyze, from a sociological perspective, the need for awareness of the rights of these persons, among social workers and other professionals. The study is based on a quantitative methodology, which uses a questionnaire applied to a sample of 103 social workers, teachers, psychologists, speech therapists, physiotherapists, doctors and other specialists involved in the field of social assistance and socio-medical services, but also a qualitative component. The main objective is to identify the level of knowledge of the rights provided by national and international legislation, as well as how this level of awareness influences the behavior and attitude of specialists in professional practice. The analysis follows the development of the triad: professional experience, specific training and openness to the social inclusion of people with disabilities. The results can help us understand better of the role of social assistance in promoting human rights and to the development of specific training programs that support the application of the principles of inclusion in professional activity. The study method underlines the importance of social construction, interdisciplinary collaboration, and ongoing education and training in developing a human rights-based practice for persons with disabilities.

**Keywords:** *disability; human rights; social construction; inclusion.*

### **Introduction**

The contemporary approach to disability requires an integrated model that combines both the legal and social dimensions of human rights. The social perspective on disability are complementary to each other because the legal framework that ensures equality and the protection of human dignity can only be understood against the background of structural barriers that lead to exclusion. It is within social assistance practice that the space for change is created, where practitioners are invited to develop a reflexive and critical consciousness capable of orienting their interventions toward real participation and social inclusion (Lawson & Beckett, 2021: 350–352). Disability rights are more than legal entitlements; they affirm our humanity as interdependent beings who acknowledge diversity and fragility among us (Roets et al., 2019:5).

Rather, disability should be seen not as an individual misfortune but rather as a starting point from which one is able critically to re-think notions about citizenship, equality, and participation outside of and indeed in opposition to medical/administrative frameworks. On one hand, the social model sees disability as oppression by society while on the other hand the human rights model sees it through lenses of dignity, justice and solutions. Both models provide pathways from good will into real tools for inclusion-and accountability. This theory complementarity supports ongoing training, interdisciplinary work and institutional policies which allow moving from charity and compassion into justice and real participation (Lawson & Beckett, 2021: 360–365).

From a sociological perspective, the approach to the rights of persons with disabilities cannot be reduced exclusively to the legal dimension or to the formal implementation of public policies, but must be analyzed within the broader context of social mechanisms of inclusion and the construction of vulnerability in contemporary societies. Research on the social economy and vulnerable groups highlights that the effectiveness of interventions depends on the articulation between the normative framework, institutional capacity, and the social recognition of beneficiaries, elements that directly influence individual participation and autonomy (Otovescu, Cioacă & Calotă, 2019). In this sense, awareness of rights represents not only an informational process but also a structural condition for transforming professional practices and for developing intervention models oriented toward inclusion, empowerment, and the reduction of social barriers.

### **1. Theoretical and legal foundations of the rights of people with disabilities**

Deinstitutionalisation and the development of the social interpretation of disability were important phases in the evolution of this group, signifying the shift from institutional control to social inclusion and citizenship recognition (Roets et al., 2019: 3–5).

Reevaluating professional competencies and structurally transforming institutions are necessary to frame disability as an expression of human diversity. An alternative to medical approaches that reduce disability to an individual impairment is the human rights approach of disability, which is based on the ideas of inclusive equality and autonomy. According to this framework, a person's status is determined by their recognition of universal dignity and their belonging to humanity (Degener, 2024: 438–440).

A society's degree of social solidarity and democratic maturity are reflected in the respect and advancement of these rights (Barnes and Mercer, 2010: 12–15).

However, unfavourable views of disability, which are seen as a disease or addiction, still have an impact on moral and political choices regarding life and death. Disability rights movements have reshaped perceptions of disability by highlighting the inherent worth and dignity of every human life (Barnes and Mercer, 2010: 98–102).

The COVID-19 pandemic was a decisive challenge for the human rights model. It brought out the existing tensions between the principle of equality and decisions about medical triage, and it reaffirmed that human dignity cannot be conditioned by functional capacity or comorbidities (Degener, 2024: 442–446).

After 1948, through the Universal Declaration of Human Rights and later on with the 2006 UN Convention on the Rights of Persons with Disabilities, there was a change in paradigm from passive assistance to active participation and exercising fundamental rights. This declaration is based on principles of legal equality, freedom and dignity; meanwhile, the CRPD reaffirms accessibility rights as well as social participation in full (United Nations, 1948; 2006).

However, the insufficiency of continuous training and institutional constraints limit the effective application of these principles. The persistence of a protectionist approach, associated with the lack of resources, highlights a significant gap between the principles enshrined in the CRPD and their transposition in practice. Coherent implementation of the convention depends on investment in the training of specialists, the development of human rights-based guidelines and the resettlement of social policies on ethical and participatory foundations (McCusker et al., 2023: 6927).

## **2. Social inclusion and public policies**

In Romania as well as in the European Union, disability is more and more perceived as a social construct caused by the connection between personal disabilities and social and institutional barriers, rather than a medical condition.. The definitions used in the CRPD and national legislation converge towards the idea that equal participation depends on the removal of physical, communicational and attitudinal obstacles, although the local terminology still retains the term "disability".

Social integration is understood as a multidimensional process: physical, functional, social, personal, organizational and societal, aimed at guaranteeing self-determination and equal access to community life. The typology of disabilities includes various areas (physical, somatic, auditory, visual, intellectual, mental, associated, rare diseases, HIV/AIDS), and statistical data highlight the concentration of cases among the elderly, which implies the adaptation of services and public policies. Labor market integration remains a sensitive area: reasonable accommodations, accessibility of spaces and combating stigma are essential conditions for full professional participation. The decision whether or not to disclose a disability in employment reflects the tension between the need for support and the fear of discrimination.

The European and national framework provides clear directions, through strategies, laws and affirmative measures to promote equal opportunities and protection against discrimination, but effectiveness depends on consistency of implementation. A gap persists between legal norms and social reality: the accessibility of the environment, insufficient information and cultural prejudices inhibit integration.

Public communication, education and awareness-raising actions, co-designing policies together with people with disabilities and their organizations, as well as mechanisms for continuous monitoring of adopted measures are a priority. Recommendations target accessible infrastructure, educational and professional inclusion, support for independent living and community participation, in a policy logic based on evidence and periodic evaluation (Burdif and Moise, 2024).

Disability is the result of the interaction of personal characteristics and social barriers, not an isolated medical problem. Inclusion strategies must aim at

eliminating structural, attitudinal and communicational obstacles. Consultation with researchers, parents, young people and organizations of people with disabilities is essential to creating effective policies and turning scientific knowledge into action (Shikako et al., 2024).

Social and health workers have a central role in this process, helping to remove physical barriers and promote accessibility by applying the principles of universal design (Owren, 2022). At the same time, policies must focus on the participation of children with disabilities and their families, recognizing them as active subjects of their own rights (Shikako et al., 2024).

In emergency situations such as those created by war in Ukraine, existing vulnerabilities of persons with disabilities will be worsened. The lack of accessible infrastructure and individualized support demonstrates the urgent need to replace the charitable-medical approach with one based on dignity and rights (Zaviršek and Cox, 2024).

At the governmental level, legislation and public policies require changes in behavior that can lead, over time, to the modification of social attitudes. The analysis highlights the fact that the effectiveness of the interventions depends on their simultaneous and coherent application at all three levels, in a logic of mutual reinforcement, in accordance with the principles of the CRPD and with a systemic approach to social inclusion (Fisher, 2024: 163-164)

In crisis contexts, such as the war in Ukraine, the vulnerabilities of people with disabilities become more acute. The lack of accessible infrastructure and individualized support demonstrates the urgent need to replace the charitable-medical approach with one based on dignity and rights (Zaviršek and Cox, 2024).

### **3. Professional competences, ethics and interdisciplinary collaboration**

The practice of social work is based on professional ethical wisdom, that is, on the ability to combine moral judgment, sensitivity and respect for human dignity (Banks, 2022).

In times of crisis, this ethic manifests itself through solidarity, critical reflection, and a balance between risk, need, and freedom. Continuous training of specialists becomes a condition for sustainable inclusion, and university education based on human rights trains professionals capable of transforming legal principles into concrete actions (Klein et al., 2024).

Therefore, disability is viewed as a relational concept and the figure of the social worker is placed within the framework of a promoter of social justice and equity. The holistic perspective on disability requires the input of different professionals: social work, psychology, education, medicine, physical therapy or speech therapy. Interdisciplinary collaboration helps in understanding complex needs and supports integrated interventions based on solidarity and collective responsibility (Roets et al., 2019; Degener, 2024)

The protection of this group can be noticed through professional competences that merge ethical judgment, legal consciousness and interdisciplinary cooperation. Social workers constantly negotiate between legal requirements, professional values and the needs of beneficiaries, using the law as a tool for protection and inclusion. The integration of professional ethics in legal decisions and the cooperation with specialists from the social, educational and medical fields are

essential for the transformation of CRPD principles into concrete practices based on dignity, participation and social justice (Claessen, 2025).

Developing a professional culture based on inclusion requires professionals to remove structural and attitudinal barriers and promote self-determination and human dignity. Social practice thus becomes an expression of moral responsibility and commitment to equity (Owren, 2022).

#### **4. Research methodology**

In the present context of social service development and policies aimed at fostering the inclusion of persons with disabilities, it is necessary to carry out an extensive analysis regarding the level of knowledge and application of specific legislation among professionals in the field. The present research aims to highlight how staff involved in the provision of social, educational and medical services perceive and apply the principles underlying the protection and integration.

The scientific approach relies on the interest to identify both the degree of information regarding the disability rights, as well as the perceptions of professionals on their own institutional role and on the barriers encountered in everyday practice. In this sense, the research does not only aim to describe an existing situation, but also outline some directions of intervention and professional training aimed at contributing to increasing the efficiency and quality of the services offered.

The research has a mixed character, integrating quantitative, qualitative methods and descriptive statistical analyses:

- *the quantitative component* used the questionnaire method applied to a sample of 103 professionals: social workers (66,02%), personal assistants (11,65%), psychologists and teachers (16,51%), medical and therapeutic staff (approximately 6%) and other specialists (5,82%);

- *the qualitative component* sought to analyze responses to three open questions designed to identify perceived barriers and practical constraints together with specialists' perceptions about their role in securing the rights concerned.

The present research has the following three objectives:

- 01. Evaluation of the level of information regarding the legislation and these rights;
- 02. Analysis of professionals' perceptions of continuing education and the institutional role in promoting inclusion;
- 03. Identification of barriers and practical limitations encountered in the application of rights in professional activity.

Starting from these objectives, the main idea of the study states that the level of awareness of rights associated with disability is significantly influenced by professional experience and participation in continuous training.

The instrument employed in this study was the: "Evaluation questionnaire - the need to be aware of the rights of people with disabilities", developed and applied between September and November 2025. The questionnaire was designed to assess the level of knowledge, attitudes and perceptions of professionals working in the social, educational and medical sectors regarding respecting and supporting them.

Before collecting data, all respondents were apprised about the study's purpose and objectives and were given informed consent for participation. Confidentiality was guaranteed; data collected would be used solely for scientific

purposes per national legislation and ethical norms regarding personal data protection. Inclusion in the study was based on active involvement in providing services to persons with disabilities and relevant professional experience within the social sector. For validity and relevance purposes, only fully completed questionnaires meeting established criteria were included in this analysis. The data collection process allowed for diverse representation of professionals directly involved in supporting people with disabilities thus contributing to increasing transparency and methodological consistency of the research.

From a total of 103 people analyzed, there is an obvious majority of social workers who represent about 66,02% from the total staff; this category constitutes the main core of social services which reflects that orientation toward direct provision of social service plus community support institutionally. The next largest percentage is comprised by personal assistants to people with disabilities at 11,65%, indicating an ongoing emphasis on care and support for vulnerable segments of society. Professionals in education and psychology (teachers, psychologists, psychopedagogues school counselors) make up approximately 16,51%; they are involved in activities related to counseling integration as well as personal development efforts. Another category of other specialists: economists, mediators, cultural managers, and other related professions, particularly employees of non-profit associations. This group accounts for approximately 5.82% of the total. They fill in the team structure through administrative and coordination activities to ensure that the organization runs efficiently and promote projects as well as initiatives impacting the community.

The Human Rights Attitude Scale (HR-AS), which was developed by Kepenekci and Cilingir in 2015, served as the basis for developing the questionnaire. It was thematically adapted to fit this particular research study. The items had been reformulated in order to capture some of the major dimensions of UN CRPD: autonomy, participation in decision making, equality, and social inclusion. The response structure followed a five-point Likert scale: 1=strongly disagree; 5=strongly agree while preserving positively and negatively valenced items according to the original model.

Results obtained from administering the questionnaire were statistically analyzed and interpreted concerning the general hypothesis of the study which aimed at identifying correlations between socio-professional variables and levels of awareness regarding rights belonging to people with disabilities.

## 5. Results and discussion

The research involved the processing of information and the interpretation of data collected in the initial study. A quantitative and descriptive research method was chosen, focused on data collection, their evaluation through statistical procedures and the objective interpretation of the results.

The tool comprises 3 main sections:

-*section A* - socio-demographic data, that aims to collect basic information about the respondents: age, gender, profession, seniority, professional training, offering the possibility of analyzing the correlations between the professional profile and the level of rights awareness;

-*section B* – knowledge of the rights of persons with disabilities: contains factual items (True/False/I don't know), which measure the degree of information of the respondents regarding the basic principles of equal rights of this group;

- *section C* – the need for awareness of the rights of people with disabilities: includes items scaled on the Likert model, which aim at professionals' perceptions of the need for continuous training, institutional responsibility, personal capacity to promote rights and the importance of interdisciplinary collaboration (social-educational-health).

The last three questions (Q16–Q18) are open-ended, allowing the free expression of respondents' opinions regarding the difficulties encountered in the application of rights, the identified barriers and the perception of the role of social assistance specialists.

Concerning the distribution of respondents by age group, data indicated a predominance of adults with consolidated professional experience. Thus, 5 respondents (4.85%) were between 18–25 years old; 9 people (8.74%) were in the group of 26–35 years old; 33 participants (32.03%) were between ages 36–45 years old and 44 respondents (42.71%) belonged to age category 46–55 years old. Twelve people (11.65%) represented the age group from 56 to 65. This distribution reveals a significant share of mature respondents aged between 36 and 55 about 75% of the total which reflects a high level of professional experience in social fields and active involvement in activities dedicated towards people living with disabilities.

*Socio-demographic characteristics* of the study group (N = 103) included variables such as gender, age, professional involvement in disability related services and professional experience within the social services field:

**Table 1.** Description of the Study Group (N = 103)

| Characteristics                                  | %     | N  |
|--------------------------------------------------|-------|----|
| Sex                                              |       |    |
| - Female                                         | 86,41 | 89 |
| - Male                                           | 13,59 | 14 |
| Age group                                        |       |    |
| - 18-25 years                                    | 4,85  | 5  |
| - 26-35 years                                    | 8,74  | 9  |
| - 36-45 years                                    | 32,04 | 33 |
| - 46-55 years                                    | 42,72 | 44 |
| - 56-65 years                                    | 11,65 | 12 |
| Professional work with people with disabilities? |       |    |
| - Yes, direct work                               | 63,11 | 65 |
| - Yes, occasionally                              | 36,89 | 38 |
| Work experience in the field of social services: |       |    |
| - Under 3 years                                  | 8,74  | 9  |
| - 3–10 years                                     | 28,16 | 29 |
| - Over 10 years                                  | 61,17 | 63 |
| - Not applicable                                 | 1,94  | 2  |

Source: generated by the authors

The study group (N = 103) is made up mostly of women - 86,41%, and people aged between 36 and 55 years. The majority of respondents 63.11% work directly with disabled people and 36,89% are occasionally involved in this field.

Regarding professional experience, most (61,17%) have more than 10 years of experience in social services, which indicates a high level of expertise among the participants.

Regarding **Objective no. 1** – *Evaluation of the degree of information and knowledge of legislation and the rights of people with disabilities among professionals who work directly or indirectly with this category*, the answers corresponding to section B of the questionnaire, respectively questions Q7–Q9, were analyzed. The analysis of the relationship between participation in professional training on the topic of disability and inclusion (Q7) and opinions about consulting them in the decisions that concern them (Q9) highlights a strong consensus among the respondents. The majority of those who have benefited from professional training believe that disabled people should be consulted directly (38 out of 41 respondents, i.e. over 92%). Also, among those who have not benefited from training, a very large proportion (49 out of 53 people) share the same opinion.

The number of "False" answers is low in both groups (1 and 4, respectively) and the "Don't know / don't answer" options are minimal. These results indicate that, regardless of participation in vocational training, respondents expressed a generally positive view regarding the importance of consulting them. The results are illustrated in the diagram below, which captures the relationship between the degree of professional training (Q7) and the perception of the consultation of people with disabilities in decisions that concern them (Q9):

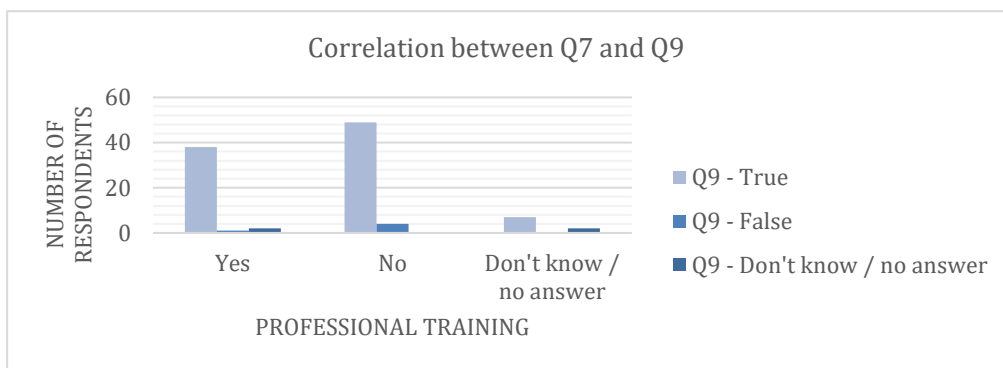


**Figure 1.** The relationship between professional training (Q7) and the perception of consulting people with disabilities (Q9)

*Source: generated by the authors*

Regarding **objective no. 2**- Analysis of the perception of professionals on the importance of continuous training and awareness of the role in supporting this process, the answers to the questions in Section C (Q10–Q13) were analyzed, which highlight a strong positive correlation between the perceptions of professionals:



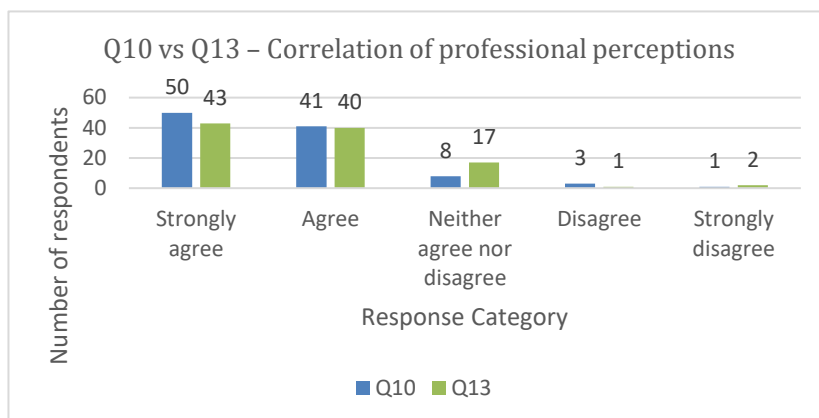


**Figure 2.** The correlation between professionals' perceptions of continuing education and the sanctioning of violations of the rights of persons with disabilities

*Source: generated by the authors*

The distribution of responses shows that most of the participants were located on the upper steps of the Likert scale. Thus, for Q10, 50 respondents (48,5%) selected "Strongly Agree" and 41 (39,8%) selected "Agree", while for Q13, 43 (41,7%) selected "Strongly Agree" and 40 (38,8%) selected "Agree". The number of 'Neither agree nor disagree', 'Disagree' or 'Strongly disagree' responses was low, together representing less than 12% of the total sample.

The analysis uses a Spearman's correlation coefficient which was calculated ( $r_s = 0,89$ ,  $p < 0.01$ ) and confirms the existence of a very strong positive statistical association between the two variables, which indicates that respondents who appreciate the importance of continuous training and information are, in general, those who support the strict application of sanctions for violating the rights of individuals with disabilities.

Results show a high level of professional awareness as well as ethical responsibility among participants that confirms value coherence and commitment to inclusion promotion plus protection of rights belonging to people with disabilities.

Regarding the identification of barriers and practical limitations in the application of these rights and the exploration of the role of social assistance specialists in the promotion and defense of these rights - **objective no. 3**, we used the qualitative analysis to complement the results obtained, to deepen the understanding of the barriers and practical limitations. In this sense, the answers received to the open questions Q16, Q17 and Q18 were interpreted:

a) the answers related to Q16 indicate that the right to work and professional integration is perceived as having the greatest difficulties in applying it in practice. Participants mention barriers such as the lack of workplace adaptations, the absence of inclusive training programs and the reluctance of employers. Other areas identified as difficult to enforce include access to accessibility measures, social and health services, and independent living, all of which are constrained by bureaucracy, inadequate infrastructure and a shortage of specialist staff. The majority of respondents identified the right to work and professional integration as the most

difficult to apply, citing *"the lack of adaptations at work and the reluctance of employers", "excessive dependence on the social protection system, instead of support for independent life", but also the fact that "the right to independent life is recognized in legislation, but in practice limited by the lack of accessibility and community services"*.

b) Regarding question Q17, the thematic analysis of the answers reveals the main systemic and attitudinal barriers. Among them are excessive bureaucracy and lack of inter-institutional coordination, aspects illustrated by the statements: *"requiring so many applications and documents after the person has a disability certificate discourages the exercise of rights"; "laws are often incomplete or delayed in implementation"* and there is *"a lack of collaboration between the institutions that should protect these rights"*. Other frequently mentioned barriers are insufficient financial resources and the lack of adapted community services, discriminatory attitudes and persistent social prejudices, legislative deficiencies and delays in the implementation of norms, as well as the lack of information and knowledge of rights, both among people with disabilities and professionals.

c) in responses to Q18, participants highlighted the essential and multifaceted role of social assistance specialists in supporting and advancing the rights of individuals with disabilities. Most consider this role very important, describing specialists as mediators, facilitators of social inclusion and central pillars of information and support. At the same time, the need for continuous training, institutional support and increased professional recognition was indicated, in order to increase the efficiency of their activity. Many describe them as *"the bridge between the vulnerable person and the state institutions"*, and others consider that *"they are the main pillar of inclusion, but with great efforts and few resources"*. Certain respondents also highlighted *"lack of institutional support and professional overload"*.

The qualitative analysis confirms the existence of a gap between the legislative framework and the practical application of the rights of persons with disabilities. The barriers identified are mainly structural (bureaucracy, resources) and attitudinal (social prejudices, discrimination, lack of information). The role of social assistance specialists is perceived as fundamental in overcoming these obstacles, through information actions, advocacy and inter-institutional collaboration, but also by encouraging the active involvement of individuals with disabilities in decisions that affect them. The obtained results confirm the hypothesis that professional experience and participation in continuous training contribute significantly towards increasing awareness and application of the rights of individuals with disabilities among social sector professionals.

The statistical analysis indicates that most respondents (61,17%) have more than ten years of professional experience, and this group shows a higher level of legislative knowledge as well as a stronger orientation towards involving individuals with disabilities in decisions that affect them.. The significant positive correlation between the importance given to continuous training (Q10) and support for the application of sanctions in cases of violation of the rights of persons with disabilities (Q13), confirmed by the Spearman coefficient, indicating a direct association between the development of professional competences and ethical responsibility in the field of social inclusion.

Analyzing the answers to the open-ended questions (Q16–Q18) from a qualitative standpoint reveals a distinct perception of the function of social assistance specialists, who are thought to be essential to the successful execution of people with disabilities' rights. The participants' point of view highlights how the degree of ongoing training, institutional support, and interdisciplinary collaboration all affect how successful social interventions are.

These findings show that professional experience, access to resources for development, and the capacity to implement the core tenets of the UN Convention on the Rights of Persons with Disabilities in professional practice are all consistently correlated.

### Conclusions

From a theoretical perspective, the empirical results support the integrated approach between the social model of disability and that of human rights (Lawson & Beckett, 2021; Degener, 2024), confirming that the application of the principles of equality and human dignity depends on the capacity of institutions and professionals to transform the normative framework into ethical and participatory practices.

Thus, the research contributes to the conceptual validation of the idea that disability cannot be understood in isolation, as an individual deficiency, but must be approached as a social phenomenon resulting from the interaction between structural barriers and the normative context (Roets et al., 2019; Barnes & Mercer, 2010).

The obtained results align with the specialized literature that emphasizes the importance of training based on human rights (Klein et al., 2024) and the development of a reflective professional ethic (Banks, 2022). They also confirm the findings of Owren (2022) and Shikako et al. (2024) on the need for interdisciplinary collaboration and universal design as tools to eliminate physical, communicational and social barriers.

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# Prospects For The (Re)Opening Of The Processing Plant In Zlatna: Employment Intentions And Associated Factors – An Exploratory Quantitative Study

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## **Abstract:**

This article examines how residents of the town of Zlatna and its surrounding localities relate to the (re)opening of a copper processing plant and to mining more generally, against the backdrop of postsocialist deindustrialization and contemporary debates on just transition. The study is quantitative and exploratory, based on a face-to-face administered questionnaire conducted between March and May 2024 (N = 127; valid N per item: 123–126), using a non-probability purposive sample. The instrument measured attitudes toward the historical role of mining, evaluations of the (re)opening of the plant, intentions to apply for a job, and perceived quality of life, alongside sociodemographic data. The results indicate a clearly favorable majority toward the project: 77% of respondents consider the opening of a new plant to be appropriate. The dominant perceived advantage is job creation (56%), whereas the main perceived disadvantage is the risk of pollution (62.2%), frequently articulated together with governance-related concerns. Intentions to apply for a job are moderate (31.8%) and are not significantly associated with occupational status ( $\chi^2(24) = 26.656$ ;  $p = 0.321$ ). Work experience in the former plant does not differentiate perceptions (Mann–Whitney,  $p > 0.34$ ), whereas a favorable perception of the historical role of mining is moderately correlated with support for the project ( $r = 0.441$ ;  $p < 0.001$ ). The conclusions outline a social window of opportunity for local industrial development policies, conditional on robust environmental governance, transparency, and credible mechanisms for public participation.

**Keywords:** *mining; quality of life; postsocialist transition; industrial development; environmental governance;*

## **1. Introduction**

The accelerated restructuring of the mining sector after 1989 constituted one of the most dramatic socio-economic transformations in Romania, generating massive job losses, out-migration, the erosion of social capital and far-reaching identity reconfigurations in communities dependent on extractive industries (Larionescu, Rughiniș, & Rădulescu, 1999; Dinică, 2000; Stegar, 2000; Schmidt &

Andrioni, 2011; Radu, 2015). Mining, frequently described in transition discourse as the “black hole of the economy”, was simultaneously a central source of economic stability and local modernisation (Kideckel, 2004). This ambivalence – between the promise of development and the socio-ecological costs it entails – is evident in numerous cases, from the Jiu Valley to Roşia Montană (Cristea, 2006; Pascaru, 2004, 2013; Alexandrescu, 2011, 2020; Mucea, 2019, 2020, 2022).

Mining operations, particularly in resource-rich yet economically developing regions, frequently catalyse significant socio-economic change and have therefore attracted substantial scholarly interest in their multifaceted impacts (Antoci et al., 2019). While mining can create economic opportunities, generate employment and support infrastructure development, such benefits are often juxtaposed with considerable social and environmental harms, including socio-economic inequalities, cultural disruption and environmental degradation (Svobodová et al., 2025; Samosir et al., 2025). A nuanced understanding of these complex interactions is crucial for policymakers and industry stakeholders seeking to design strategies that maximise benefits while mitigating adverse consequences (Narrei & Ataee-pour, 2021; Mwanza & Bowman, 2018).

Against this backdrop, the present article seeks to identify the benefits that the mining sector ought to provide to local communities in order to offset its negative environmental effects, with a specific focus on employment intentions and associated factors linked to the reopening of a processing plant (Rey-Martí et al., 2023). More precisely, the study examines local community perceptions of employment prospects, anticipated socio-economic transformations and the potential for sustainable development initiatives to accompany the resumption of operations at a copper processing facility in the town of Zlatna, Alba County (Ngobese, 2015; Osei & Yeboah, 2023). For example, correlating demographic trends with residents' perceptions indicates a significant gap between the actual situation and how the future of the mining town of Roşia Montană is projected (Mucea & Marina, 2022).

Zlatna represents a locale marked by a dense industrial memory, where copper metallurgy has structured the local economy and biographical trajectories for decades. The closure of the former plant in 1997 constituted a historical turning point with long-term consequences for employment, demographic structure and community cohesion. At present, the proposed (re)opening of a copper processing unit reactivates the promise of economic revitalisation, while simultaneously rekindling anxieties regarding pollution and the possible reproduction of inequalities or clientelist practices in access to resources (Buşiu & Pascaru, 2011; Budai & Herţa, 2016).

At the same time, European decarbonisation policies and debates on just transition further complicate the analytical landscape. The relaunch of industrial activities with significant environmental impact potential is confronted with more stringent regulatory requirements, reconfigured supply chains and pressing questions regarding the distribution of costs and benefits (Beckfield & Evrard, 2023; Eadson, van Veelen, & Backius, 2023). In this context, understanding local community perceptions becomes essential both for the sociology of development and for the design of public policies.

The aim of this study is to investigate how residents of Zlatna and its surrounding localities relate to the (re)opening of a copper processing unit, to describe intentions to seek employment in the new facility and to identify the socio-demographic and attitudinal factors associated with these positions. The article thus situates itself at the intersection of the sociology of post-industrial communities, studies of extractive industries and analyses of transitions towards new development regimes.

The specific research objectives are: (O1) to capture how the historical role of mining and of the former plant in Zlatna's development is perceived; (O2) to analyse public support for the opening of a new copper processing unit and the arguments advanced for and against it; (O3) to measure the degree of interest in employment in the new facility; and (O4) to assess perceptions of quality of life in the town and its relationship with support for the project. Four hypotheses are formulated: (H1) work experience in the former plant is associated with more positive perceptions of the new project; (H2) a favourable attitude towards mining and its historical role is positively correlated with support for reopening; (H3) socio-economic status influences the intention to apply for a job; and (H4) a more positive perception of quality of life is associated with opposition to reopening.

By foregrounding employment intentions, perceived quality of life and evaluations of mining's historical role in a single analytical framework, the study offers a contextually grounded perspective on how communities negotiate the trade-offs between environmental risk, economic security and future development trajectories in an era of decarbonisation and supply-chain reconfiguration. The remainder of the article presents the socio-historical context and theoretical framework, describes the research design and the profile of respondents, sets out the main findings and interprets them from a sociological perspective, and concludes with a discussion of the key implications and limitations of the study.

## 2. Study context

During the communist era, Zlatna was one of the most important industrial centres in Romania, due to its copper processing complex and chemical plants. In the 1980s, the complex produced approximately 15,000 tonnes of copper annually, as well as sulphuric acid and copper, iron, and magnesium sulphates. This activity transformed the town into a hub of heavy industry, but also into one of the most polluted towns in Europe, with high levels of noxious emissions and metallurgical waste that severely affected the health of the population and the surrounding environment. In order to reduce pollution, a 220-metre gas emission stack was built, yet the technical solutions proved insufficient, and local residents repeatedly reported the problems without seeing substantial improvements (Țimonea, 2021; Guță, 2023).

After the plant was closed in 2003, the authorities initiated plans for the economic revitalization of the area. Recently, the Ministry of Economy, in partnership with Zlatna Town Hall, has proposed the restarting of non-ferrous metallurgical capacities through the construction of a new plant for the production of electrolytic copper on the infrastructure of the former complex. The project aims to attract strategic investors and to integrate into the value chain of domestic resources, reducing the export of raw materials and generating high value-added finished

products. This initiative is included in the 2017–2020 Government Programme and has the objective of transforming Romania into a competitive economy based on innovative and environmentally friendly industries (Ministry of Economy, 2017).

### **3. Socio-historical context and theoretical framework**

The literature on the transformations of post-socialist mining communities documents the profound effects of deindustrialisation, such as rising unemployment, labour migration, the reconfiguration of gender relations and family models, as well as the weakening of social capital (Larionescu et al., 1999; Kideckel, 2004; Schmidt & Andriani, 2011; Budai & Herța, 2016; Radu, 2015). In the Jiu Valley, for example, industrial reforms have led to what Stegar (2000) calls an “economic and social collapse”, while in Roșia Montană, the attempt to relaunch mining generated a large-scale social conflict with transnational reverberations (Cristea, 2006; Alexandrescu, 2011, 2020; Mucea, 2018, 2019, 2020).

These cases have fuelled debates on distributive justice, heritage and environmental protection, relocation processes, as well as public participation in decision-making related to industrial investments (Buțiu & Pascaru, 2011; Pascaru, 2013; Maței, 2014). At the same time, recent research on “decarbonisation” emphasises how energy transition policies reconfigure not only jobs but also places themselves – communities, landscapes, and local identities (Mucea, 2022; Beckfield and Evrard, 2023; Eadson et al., 2023)

Zlatna is part of a historical genealogy of copper metallurgy, and the post-1997 decline has been perceived by many residents as a major rupture in the social order. This study proceeds from the premise that current perceptions of the (re)opening of a processing facility are shaped by the interaction between three registers: (a) the economic and symbolic memory of the mining past; (b) concrete experiences of restructuring and of life after closure; and (c) the horizon of expectations regarding quality of life and local development in the contemporary context.

### **4. Research methodology**

The research employs a quantitative, exploratory design based on a questionnaire survey, in line with classical recommendations regarding the design of sociological investigations (Mărginean, 2004). The questionnaire, developed by the authors, was administered face-to-face in the town of Zlatna and in the surrounding localities under its administration between March and May 2024. Sampling followed a non-probability purposive strategy, targeting adult persons who had been residing in the administrative-territorial unit Zlatna for at least one year.

A total of 127 questionnaires were collected, with the number of valid cases varying slightly across items (valid N: 123–126), depending on non-responses. Given the exploratory nature of the study and the non-probability sampling, the results cannot be strictly statistically generalised to the entire population of Zlatna, but they offer a consistent picture of the dominant attitudinal configurations.



#### 4.1. Objectives, hypotheses and analytical procedures

The overall aim and the four objectives (O1–O4) were operationalised into the research hypotheses H1–H4:

- H1: Work experience in the former complex is associated with more positive perceptions of the opening of the new facility (tested using the Mann–Whitney U test, with a dichotomous grouping variable “worked/did not work in the former complex”).
- H2: A favourable attitude towards mining and its historical role is associated with support for the opening (tested using Pearson’s correlation between the assessment of the historical role and the perceived opportunity).
- H3: Socio-economic status (occupation) influences the intention to apply for a job (tested using  $\chi^2$  between occupation and intention to apply).
- H4: A more positive perception of quality of life correlates with opposition to the opening (tested using Pearson’s correlation between the assessment of quality of life and the perceived opportunity).

The analyses included descriptive statistics (frequencies, percentages) and significance tests (Mann–Whitney U,  $\chi^2$ , Pearson correlations), with a significance threshold of  $p < 0.05$ . The cross-sectional nature of the data does not allow for causal inferences, but only for the identification of associations between variables.

#### 4.2. Research instrument and variables

The questionnaire comprised four main blocks of items:

- a. Perceptions of the historical role of mining and of the period of the former complex, including global evaluations (“overall opinion of the role of mining in the town’s development”) and statements regarding the standard of living and the main problems (e.g. “during the period of the former complex people lived well”; “the main problem was pollution”).
- b. Attitudes towards the (re)opening of a copper processing facility, measured through direct questions regarding the perceived opportunity of opening (“definitely yes” – “definitely no”), Likert-type items on anticipated consequences (“it is good news”; “it will create jobs and development”; “it will increase the standard of living”; “it will increase pollution”), and open-ended questions about the main advantages and disadvantages.
- c. Intention to seek employment, measured by a five-point scale item (from “to a very small extent” to “to a very great extent”) capturing respondents’ willingness to apply for a job in the new facility.
- d. Perception of quality of life and sociodemographic characteristics: an overall evaluation of quality of life in Zlatna (five-point scale), statements regarding the town’s prosperity and attractiveness (“Zlatna is currently going through a prosperous period”; “it is a town where it is worth living”), along with variables such as gender, age, education level, occupational status, length of residence, and work experience in the former complex.

## 5. Profile of respondents

The investigated batch is balanced in terms of gender distribution: 50.8% men (64 respondents) and 49.2% women (62 respondents). Respondents' ages range from 19 to 72 years, with the most numerous cohorts being 50–59 years (30.3%) and 40–49 years (22.2%), indicating a concentration in the age groups that are active or approaching retirement.

From an educational standpoint, the predominant level is high school (47.2%), followed by bachelor's studies (20%), post-secondary school/foremen's school (11.2%), master's studies (11.2%) and 10 grades/vocational school (10.4%). This profile reflects an educational structure close to the patterns of industrial communities, in which secondary and technical education occupy an important place.

Occupational status indicates a predominantly active population: 82.5% of respondents are employed, 10.3% are retired, and the rest are distributed among unemployed persons (with or without unemployment benefits), students, and authorised self-employed persons (PFA)/entrepreneurs. Although the proportion of unemployed persons is relatively low in the sample, the segment of persons without unemployment benefits proves relevant in the analysis of employment intentions.

Another important element is the relationship with the territory: 91.1% of respondents have been living in the Zlatna for more than one year (they have not recently been away working abroad), which suggests strong residential embeddedness and gives consistency to the analyses regarding perceptions of quality of life and local development. Some respondents report having worked in the former complex, which allows testing of the hypothesis regarding the influence of biographical experience on current perceptions.

Overall, the sociodemographic profile outlines the image of a community with relatively diverse resources, largely active on the labour market (though not necessarily in Zlatna itself), residentially anchored and with a direct or mediated memory of the previous industrial period.

## 6. Study findings

Taken together, the findings outline a complex but relatively favourable situation regarding the opening of a new processing facility in Zlatna. There is a clear pro-opening majority, primarily motivated by expectations of job creation and local development. This support is accompanied by a positive economic memory of the mining past and by a predominantly good evaluation of the current quality of life.

At the same time, the risk of pollution is perceived as the main disadvantage, and issues of integrity (corruption, clientelism) recur in the open-ended responses. The result is a conditional, "yes, but" type of support, in which the social legitimacy of the project critically depends on environmental standards, decision-making transparency, and fairness in recruitment processes.

From the perspective of determinants, attitudes towards mining and perceptions of quality of life matter more than work experience in the former complex or current occupational status. This suggests that local policies oriented

towards (re)industrialisation must take into account not only the structure of the labour market, but also the community's symbolic and value configurations.

### **6.1. Mining memory and perceptions of the past**

Most respondents formulate a favourable assessment of the historical role of mining in the development of Zlatna: 39.7% rate this role as “good” and 36.5% as “very good”; 19.8% hold a “neutral” opinion, and only 4% express a “poor” opinion. At the same time, 82% consider that during the period of the former complex “people lived well” (total or partial agreement), and 71.1% agree that “after the closure of the former complex things went worse”. These results indicate the existence of a positive economic memory of industrialisation, perceived as a time of relative prosperity.

However, the same memory clearly retains the environmental costs: 86.3% of respondents agree (totally or partially) with the statement that “the main problem in the period of the former complex was pollution”. By contrast, 82.8% now believe that “the current level of pollution in Zlatna is low”. Thus, a balanced retrospective assessment emerges, which simultaneously recognises the socio-economic benefits of mining and its negative externalities for the environment.

Sociologically, this dual register – economic prosperity and high pollution – constitutes the evaluative context in which respondents formulate their positions regarding the (re)opening of a new facility: support for potential industrial development is conditional on explicit guarantees concerning pollution control..

### **6.2. Support for opening a new copper processing facility**

In response to the question regarding the perceived opportunity of opening a new copper processing facility, 42.9% of respondents choose “definitely yes” and 34.1% “probably yes”, summing up to 77% favourable opinions. Opposition is clearly in the minority: 7.1% “probably no” and 11.1% “definitely no”, while 4.8% do not know or do not answer. In the same vein, 79.7% consider that the opening would be “good news”, confirming the existence of a pronounced pro-opening majority.

The items on anticipated consequences bring to light the motivational core of this support: 64.8% fully agree with the statement that the opening “will create jobs and development”, and 20.8% partially agree. In the open-ended question regarding the main advantages, 56% of respondents spontaneously mention “jobs”, while other advantages (local development, income growth, infrastructure) appear less frequently. Thus, a representation emerges in which employment is the keystone of the project's legitimacy.

Conversely, the dominant disadvantage identified in the open-ended item is pollution (62.2% of mentions). This disadvantage is often associated with governance issues: respondents evoke the risk of corruption, clientelism in employment, and the “enrichment of certain influential persons”. From the perspective of procedural justice theory, these concerns suggest that social acceptability depends not only on the distribution of benefits and risks, but also on the perception of fairness and transparency in the implementation process (Buțiu & Pascaru, 2011; Pascaru, 2013).

Hypothesis H2 is supported by the data: the Pearson correlation between the assessment of the historical role of mining and support for the opening is positive and moderate ( $r = 0.441$ ;  $p < 0.001$ ;  $N = 126$ ). As perceptions of the historical role shift from “neutral” to “good” and “very good”, the proportion of those who consider the

opening “definitely appropriate” increases. Thus, a valorising economic memory translates into pro-development preferences, without, however, cancelling awareness of environmental risks.

### **6.3. Intention to work in the new facility**

Interest in applying for a job in the new facility is moderate. On the corresponding item, 38.9% of respondents state that they would be interested “to a very small extent”, 11.1% “to a small extent”, 18.3% “to a moderate extent”, 15.1% “to a great extent” and 16.7% “to a very great extent”. Approximately one-third of the sample (31.8%) therefore show high interest (“great/very great”), while half express low interest.

From the perspective of occupational status, the distributions suggest distinct profiles: employees tend to be more reserved (37.5% report interest “to a very small extent”); retired persons also concentrate very low options (61.5% “to a very small extent”), while unemployed persons without benefits stand out through very high interest (50% “to a great extent”, 50% “to a very great extent”). However, the  $\chi^2$  test does not indicate a significant association between occupation and intention to apply for a job in the event of the facility re-opening ( $\chi^2(24) = 26.656$ ;  $p = 0.321$ ;  $\Phi = 0.460$ ;  $V = 0.230$ ;  $N = 126$ ), thus refuting hypothesis H3.

The sociological interpretation of this result indicates that, beyond one’s formal position on the labour market, the decision to apply for a job in a mining/metallurgical facility is influenced by more subtle factors: the perceived compatibility of one’s qualifications with future jobs, trust in the fairness of recruitment processes, the assessment of environmental and health risks, as well as biographical projects (e.g. whether one intends to remain in the locality). Employment intention cannot be mechanically inferred from occupational status, even if certain segments (such as unemployed persons without benefits) descriptively display a stronger appetite for such opportunities.

### **6.4. Perception of quality of life and its relationship with project support**

The overall evaluation of quality of life in Zlatna is predominantly positive: 59.1% of respondents describe it as “good” or “very good”, while 35% opt for “neither good nor poor” and 5.7% for “poor/very poor”. Moreover, 79.3% consider that “Zlatna is currently going through a prosperous period”, and 82.4% agree with the statement that “Zlatna is a town where it is worth living”. These results indicate the existence of a background of civic optimism, despite the structural challenges of the labour market. It should not be overlooked that Zlatna lies at a distance of approximately 37 km from the county capital, Alba Iulia; commuting for work is relatively easy, both by private car and by public transport (bus or train).

Hypothesis H4, according to which a better evaluation of quality of life would be associated with opposition to the opening of a new facility (in the logic of a possible NIMBY-type scenario), is refuted. The Pearson correlation between the assessment of quality of life and support for the opening is positive ( $r = 0.264$ ;  $p = 0.003$ ;  $N = 122$ ). Descriptively, among respondents who consider quality of life to be “very good”, the proportion of those who deem the opening “definitely appropriate” is substantially higher than in groups with more reserved evaluations.

This result suggests a “consolidation of well-being” logic: in communities that perceive themselves as being on a positive trajectory, industrial projects are not seen as a threat to the status quo, but as potential amplifiers of favourable trends, provided that environmental and governance risks are adequately managed..

### **6.5. Work experience in the former complex and current perceptions**

To test H1, three dependent variables were used: (a) the assessment of the opportunity of opening a new facility; (b) agreement with the statement that the opening would be “good news”; (c) agreement with the statement that the opening “will increase the standard of living”. The grouping variable is work experience in the former complex (yes/no). The Mann–Whitney U tests do not indicate significant differences between groups: for opportunity,  $U = 1505$ ,  $Z = -0.946$ ,  $p = 0.344$ ; for “good news”,  $U = 1434.5$ ,  $Z = -0.796$ ,  $p = 0.426$ ; for “will increase the standard of living”,  $U = 1630.5$ ,  $Z = -0.135$ ,  $p = 0.893$ .

Although mean ranks suggest, in some cases, a slightly more favourable inclination among those with work experience in the complex, the differences do not reach statistical significance. Hypothesis H1 is therefore refuted. Sociologically, this indicates that direct biographical work experience in the complex does not constitute a major cleavage in current public opinion; perceptions are shaped more by the present context and by collective representations of mining than by individual experiences from several decades ago.

## **7. Conclusions and limitations**

The study highlights four main conclusions. First, Zlatna is currently in a social window of opportunity for (re)industrialisation: a significant majority of residents support the (re)opening of a copper processing facility, perceived as a chance to consolidate local well-being. Support is fuelled by a positive economic memory of the mining past and by strong expectations regarding jobs and development.

Second, the intention to work in the new facility, although moderate overall, is significant in vulnerable segments of the labour market (unemployed persons without benefits), but is not decisively determined by current occupational status. This suggests that public policy interventions (training, retraining, counselling) should be calibrated not only to occupational categories, but also to risk perceptions and trust in the project.

Third, public perceptions are structured more by contemporary attitudes towards mining and evaluations of quality of life than by individual work experience in the former complex. The fact that those satisfied with quality of life are, on average, more favourable to the opening contradicts simplified NIMBY-type scenarios and supports the idea of a “consolidation of well-being” logic.

Fourth, the risk of pollution and mistrust in the integrity of institutional processes are the main conditions of the project’s legitimacy. For current support to turn into an enduring consensus, local policies should include: (a) strict environmental standards, monitored and communicated to the public through accessible indicators; (b) robust integrity mechanisms in recruitment and contracting; (c) genuine, not merely formal, procedures for public participation, in

line with the recommendations of the literature on concentric participation and the glocalisation of industrial projects (Buțiu & Pascaru, 2011; Pascaru, 2013; Alexandrescu, 2020).

The study nonetheless has important limitations. First, the sample is non-probability, purposive, which restricts the generalisation of the results to the entire population of Zlatna. Second, the instrument is being used for the first time, so there are not yet strong psychometric validations of the scales employed. Third, the relatively small size of the sample and variation in valid Ns per item may affect the stability of some estimates. Fourth, the cross-sectional design does not allow causal conclusions, but only the identification of associations between variables.

For future research, the following would be useful: (a) studies on probability samples that would allow more robust inferences; (b) multivariate models (for example, ordinal regressions or structural equation models) for estimating the net effects of attitudinal and sociodemographic variables on project support and employment intentions; (c) qualitative research (interviews, focus groups) to deepen the understanding of mechanisms of trust formation and perceptions of procedural justice; (d) comparative analyses with other mining communities in similar situations, in the broader perspective of energy transition and decarbonisation.

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# Smart Refugees And The Role Of Technology In Their Integration Into Host Communities

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## **Abstract:**

Digitalization has become an integral part of human life fueled by both the pandemic and the rapid advancement of technology in recent years. It has brought new opportunities to address various societal challenges we face, including the integration of refugees into host communities. Digital solutions can facilitate the use of tools that can ease the work of organizations and institutions dealing with the adaptation and integration of refugees, however, it also has its own vulnerabilities that require new adaptation measures. This article presents a qualitative study with refugees from Ukraine, settled in the Rădăuți city, to investigate the uses and purposes of social networks, associated with different areas of refugee integration in our country. The results indicate that social networking sites were particularly relevant for refugee participants in acquiring language and cultural skills, as well as maintaining connection with family and building new ties with the host community. The article concludes that digital technology, in particular smartphones, are increasingly considered a useful resource in programs that provide settlement services or promote participation in social life and hold untapped potential for integration processes

**Keywords:** *Ukraine refugees, integration, digital technology*

## **1. Introduction**

The popularity of smartphone and social media use among Ukrainian refugees has not gone unnoticed during the recent crisis. The use of a smartphone was essential for these refugees, primarily to stay in touch with family and friends remaining in Ukraine, to receive advice from refugees who have already arrived in other countries in Europe, and last but not least to maintain contact with local authorities who offer them protection and assistance. Also, social networks accessed via smartphone were a crucial source of information in the decision-making process regarding continuing migration or settling in Romania. Therefore, social networks have become popular communication channels that make refugees more informed about migration possibilities and settlement destinations (Dekker, Engbersen & Faber, 2016; Thulin & Vilhelmson, 2014) about the possibilities of integration into the host community (job offers, housing, educational offers for children, but also possibilities to complete education through online learning programs, etc.)

Smartphones also provide access to strategic information that is disclosed through social networks and that can be used during the crisis and after. However, studies also describe obstacles and risks in the use of social networks, risks related to the circulation of misinformation that could hinder the process of social and professional inclusion ((Dekker & Engbersen, 2014; Wall, Campbell & Janbek, 2017).

Moreover, social networks and other smartphone applications for navigation and translation empower refugees, making them less vulnerable to becoming victims of traffickers, and this new autonomy, according to Collyer (2007: 674), makes “refugees more self-reliant (Zijlstra & Van Liempt, 2017), giving them the chance to adapt much more easily to the new context offered by the host community.

Language is another crucial indicator of integration, the media playing a variety of roles in this process. Through technology, foreign languages can be learned through online training programs and applications, but also through communication platforms. Thus, digital technology acts as an essential bridge, facilitating not only language learning, but also the cultural and social integration of refugees into new communities. Based on the results of a qualitative study conducted with refugees from Ukraine living in the Rădăuți city, this study highlights what Ukrainian refugees gain through the use of technology, more specifically through one of its tools, namely – smart phones: information and communication resources that allow them to develop “smart” adaptation and integration strategies. This paper explores the relationships between the use of social networks, as an important factor in the lives of migrants, and integration processes, analyzing how refugees use these technologies to adapt to the new environment, to the new culture of the host community.

## **2. Theoretical and Conceptual Framework**

The issue of refugee integration is approached by specialists from two points of view, namely: it is a one-way process, in which refugees must adapt to the host society, while the host society does not have the responsibility to adapt to them (Da Lomba, 2010). It is an assimilatory perspective in which refugees should abandon their own cultures and values and adopt those of the new society, and those who fail to achieve the same adaptation goals and therefore do not integrate become a problem for host societies (Strang & Ager, 2010). Another problem with this integration approach is that it does not recognize the cultural and social diversity of refugee populations (Da Lomba, 2010). And the second perspective on integration defines it as a two-way process characterized by the involvement of refugees as well as host societies in the adaptation of newcomers (Ager & Strang, 2004). In this context, both refugees and members of the host society play a crucial role in ensuring that refugees have access to jobs, education, housing, health, culture and language, and that they feel part of the new environment rather than problematizing the refugees. In his influential theory of acculturation, Berry (2006) also argues that the integration process involves both minority and dominant groups to enable them to negotiate their cultural differences and avoid conflict.

The integration of Ukrainian refugees into the societies of the new host nations is yet again a major challenge for the European countries (e.g., Hannafi and Marouani 2022; Brell et al., 2020). In this context, governments shape their strategies to address the needs of newcomers based on historical, political, economic and social factors (Ferris, 2020) and institutions responsible for providing essential services, such as health services, housing, language courses and employment opportunities, have made efforts to respond within the limits of their means, resources and expertise (Fike&Androff, 2016). A key element contributing to both the resettlement and integration of refugees is digital technologies. However, studies show that individual, cultural and socio-economic factors of refugees, such

as language, communication styles, cultural background, education level and age (Chen, 2012; Sawyer & Chen, 2012), as well as attitudes towards integration can cause significant differences in media use during their adaptation (Dekker & Engbersen, 2014). It has also been highlighted that the sociopolitical conditions of the reception context (e.g., integration policies, host society's attitudes towards newcomers, labor market conditions, etc.) can also enable or hinder the refugees integration (Alencar & Deuze, 2017).

Furthermore, due to the increased intersection between social and technological elements of everyday life, digital technologies such as social networks and smartphones are becoming “lifelines”, providing social connections and bridges for refugees (Berg, 2022; Merisalo & Jauhiainen, 2021). At the same time, financial, linguistic, cultural and employment barriers limit many refugee communities' access to technology and digital education (Dahya et al., 2020).

Also, according to Ives (2007), active participation in education and language learning is essential for a successful integration process, and technology plays a crucial role in this, providing flexible and accessible tools, for example: *translation tools* (Google Translate), *language learning apps* (Duolingo or Mondly), *online learning platforms and virtual courses* (YouTube), *mentoring and virtual interaction*, (video call, chat), *access to local information and resources* (learning the language through exposure to specific terminology and local context).

Eurostat (2018) indicates that “mastery of the host country language is the most important skill that refugees need to integrate into the host country”. Furthermore, researchers have shown that education and language enable social inclusion and improve well-being (Stanley et al., 2011). Language learning is not only crucial for daily interactions with the host society, but is also a requirement for almost all integration activities. For example, finding a suitable job generally requires mastering the local language, continuing your studies, and engaging in social and cultural activities.

Qureshi (2019) shows that the implementation, use or diffusion of technology leads to improvements in people's lives through the economic, social and human conditions of a group of people, community or region (Qureshi, 2019), which, in turn, leads to the achievement of a socially inclusive society.

### 3. Methodology

In this study, we applied a qualitative methodological research method using the focus group. It was conducted in July 2025, with eight refugees from Ukraine, settled in the Rădăuți city, who received a residence permit<sup>1</sup> in 2023. The study does not aim to generalize, but rather tries to provide information about the stories of Ukrainian refugees who use smartphones and the internet to cope with the challenges of their daily lives and integrate into their new community.

The social worker of the *Aghata Association* from Rădăuți, who has been involved in the refugee issue since the beginning, helped us contact the respondents,

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Ukrainian refugees in Romania obtain a residence permit (through temporary protection) that <sup>1</sup> allows them to work, have the right to reside and access to housing, social protection and healthcare, and access to education, with an initial duration of 12 months, with the possibility of extension (<https://www.consilium.europa.eu/ro/policies/refugee-inflow-from-ukraine/>)

with whom she has collaborated and supported for the last two years. We explained to the respondents that the research aims to study how access to information from the online environment influenced their decision-making regarding migration and the desire to stay in Romania, and how technology helped them integrate. Ethical concerns included the confidentiality of the respondents – we explained that this involved a study conducted by academic researchers and that the responses would be anonymous and would have no consequence on the respondent's residence status. Informed consent to participate in this research was then obtained from all respondents before the interview began.

Our sample consisted only of women aged between 35 and 66. A quarter of the respondents had a higher education level (university), the rest had graduated from high school or intermediate vocational studies. The focus group took place at the *Agatha Association* headquarters and there was no need for a translator/interpreter because all respondents spoke Romanian. The focus group lasted 60 minutes, and all respondents agreed to be audio-recorded.

The discussions were as follows: introductory questions about migration to Romania, access to online information before and during migration, transmitting information to families/friends in Ukraine after arrival in Romania, general perceptions regarding the use of the internet in the socio-professional integration process and the use of certain smartphone applications and functions in everyday life. And finally, some demographic questions. The discussions started by asking about various sources of information (personal contacts, non-governmental organizations (NGOs), etc.) and intermediaries (face-to-face contacts, media, internet, etc.) used before and during migration. Subsequent questions focused in particular on the use of online information, the internet specifically, social networks and various devices (smartphones) in their process of adaptation and integration into the Rădăuți community.

#### **4. Analysis and Discussion**

The focus group discussions touched on the following topics that were of major importance in the process of social and professional integration of Ukrainian refugees in the Rădăuți city.

##### ***a. Solving Everyday Problems with Digital Technology***

Respondents found ways to incorporate devices into their daily lives until smartphones became indispensable, deeply ingrained tools for solving problems, connecting with host community members, sharing information, and creating communities of mutual support. There were also crucial moments when the refugees interviewed realized the potential of the device they owned.

*One Sunday I felt bad and needed medicine and I searched on Google and found a pharmacy that was open...the phone helped me a lot...(refugee, 52 years old)*

*Last year I found another place to live and I needed help moving my things....I asked a question on the Whats App group and within three hours two volunteers from Rădăuți came and helped me...(refugee, 60 years old)*

Technology, through various applications, also provides access to local society, allowing newcomers to familiarize themselves with the place, to explore interesting places in the community so that integration can occur naturally. One respondent said that the Waze application had helped her a lot since she arrived in Rădăuți, especially in finding the institutions where she needed to solve various problems and the headquarters of the various associations in Rădăuți that were helping refugees.

*We have meetings at various associations in Rădăuți and the Waze app helped me a lot to find the locations. A volunteer installed the app for me right when I crossed the border. And now I always use it to get where I need to go. (refugee, 37 years old)*

*In Ukraine I never used the app on a mobile phone to go from one place to another... I knew all the places and if I didn't know I asked someone. Here when I was at the beginning and I didn't speak Romanian I couldn't do that...(refugee, 48 years old)*

Smartphones and GPS-based services play a defining role in *familiarizing refugees with urban space* (Kim & Lingel, 2016, ) and are particularly helpful for those from rural backgrounds. In this way, location-based media technologies may even have an empowering effect, allowing refugees to explore their new urban surroundings with more confidence and independence. Conversely, research has indicated that reliance on smartphone technology can also limit opportunities to socialize with locals, as technology replaces the need to ask for directions (Kim & Lingel, 2016).

Another vital element provided by technology is access to help. Refugees use the phone for personal safety, allowing them to call for help in an emergency, and also to contact humanitarian organizations, NGOs, volunteers and authorities, to request assistance, accommodation, legal support, etc.

*Personally, the phone gives me a sense of security, because I have health problems, and when I feel sick I can call an ambulance and it comes here very quickly.....(refugee, 65 years old)*

*One of the reasons that made me stay in Rădăuți is that the people are very good here and I became very attached to them... whenever I needed something I called and immediately received help...(refugee, 37 years old)*

### ***b. Everyday communication and learning Romanian***

The second important theme revealed by the data was learning Romanian and English and translating in everyday use. ). Smartphones are increasingly used in mobile learning as they are 'particularly suited for supporting personalized, situated, authentic and informal learning' (Kukulska-Hulme et al., 2015, 16).

Devices have become recognized as tools for language acquisition and translation (Sharples, 2013), especially by refugees for whom language skills are essential for social integration (Gaved & Peasgood, 2017). Respondents indeed

reported various practices of using YouTube videos for language purposes and Google Translate applications, especially in the workplace. The Google Translate application was used by respondents in particular to translate food labels from supermarkets.

*The videos on YouTube helped me a lot to improve my Romanian...I spoke Romanian but not very correctly...(refugee, 35 years old)*

*I used Google Translate at the store, especially to see if there were vegan products or not...I'm still fasting and I wanted to make sure I was getting what I needed....(refugee, 52 years old)*

*I also used YouTube to learn Romanian but the lessons I attended at the Rădăuți Civic Association were very helpful, where I did Romanian with a compatriot of ours who had moved to Romania a while ago...and it was much easier...and after less than 4 months I found a job...I was really lucky! (refugee, 48 years old)*

Apps and videos available on YouTube, created by other refugees or native speakers, for free, have become vital tools for supporting the integration of Ukrainian refugees in Romania. Translation apps were consistently used by respondents, especially to overcome language barriers in critical situations, such as a medical consultation or official interactions.

*The hardest thing for me was when I arrived in Romania, I didn't know the language and I had to urgently get to the doctor... when I arrived, although I was accompanied by a volunteer who translated, to make sure the doctor understood what was hurting me, I put them on Google Translate(refugee, 48 years old)*

Social groups also provide invaluable opportunities to practice language in a natural and relaxed context, being a central pillar of successful refugee integration.

*I am in a WhatsApp group with a few friends from Rădăuți and the fact that we chat every day has helped me to speak Romanian better but especially to write. (refugee, 35 years old)*

Some of the respondents (those who did not know Romanian at all when they arrived in the country) claimed that although it was difficult for them to learn the language, it helped them a lot, especially at work, providing a sense of security and alleviating isolation.

### ***c. Social media and access to information***

Respondents positively assessed the use of social media before and during their trip to Romania. They mainly appreciated social media for the wealth of

information available, the timeliness of the information and, in particular, for information based on personal experiences. Social media provides refugees with diverse types of information, making them less vulnerable to fraud and disinformation (Rianne Dekker, Godfried Engbersen, Jeanine Klaver & Hanna Vonk, 2018).

Respondents stated that they are part of several WhatsApp groups, including one in which there are refugees and important social actors from the host community, where are transmitted informations regarding accessing various social or medical services, information regarding to access to Rădăuți schools and kindergartens for children's refugee, about NGOs that provide support as well as projects launched with the aim of supporting refugee communities, available jobs and spaces/housing for rent. Another group is made up only of refugees, here they share experiences, offer solutions to various problems, offer each other accommodation, information about jobs, information about social services and emotional support for newly arrived people, but the fact that they communicate in their native language is a great advantage because the information is understood much better and also provides comfort and emotional support. Another group is made up only of family members, both those who managed to cross the border and those who remained in Ukraine. It has the primarily role of emotional support, of transmitting news related to the situation in Ukraine but also of requesting support. Facebook is also very popular among refugees, which allows them access to vital information provided by various institutions in Romania but also those regarding the evolution of events in Ukraine. It is a very important tool that also contributes to the integration of refugees.

*The fact that we can express our problems in our own language is a great advantage...you are better understood and you see that you are not the only one who has this problem and then the situation does not seem so bad. (refugee, 52 years old)*

*Although I am not active in the Whats App group, I read everything that is written there and I find out a lot of information, especially those related to the law and how we can benefit from certain services. (refugee, 60 years old)*

*I use Facebook a lot, I like to read the news, to find out the news especially from here in the city and information about the events that are organized for us. (refugee, 48 years old)*

Smartphones also offer many advantages for maintaining contact with family and friends who remained in Ukraine. Regular exchanges of selfies, animated video chats, video communication, voice messages and emoticons have not only reduced the physical distance between refugees and their loved ones but have also provided a sense of togetherness, contributing to the health and well-being of loved ones.

*When I was at home in Ukraine, I didn't use video on WhatsApp, now whenever I get a free moment, I call my family ...at least to see them for a few minutes. (refugee, 52 years old)*

For many refugees, caring for their parents or grandparents left behind in Ukraine is enormous given the uncertain and unstable situation in the country, which is why they felt an immense moral responsibility to maintain constant contact with them, even virtually.

*I'm always paying attention to my phone...if it beeps it means I've received a message and I open it the next second to see if it's from my parents...it's the only way I feel close to them. (refugee, 48 years old)*

Most respondents reported that they never disconnected from the internet for fear of missing a message or call from family, and when they were looking for a job, from potential employers. The desire to always stay connected and the possibility of doing so, increased the chances of finding a job, of being informed in time about various legal aspects related to their status and, last but not least, of staying connected with family.

*One day I was away from Rădăuți to visit an acquaintance who lives right near the border and I didn't really have internet there...and when I came back I think we had 20 messages from my family...they had become very worried...since then I try to always stay connected... (refugee, 37 years old)*

*I got used to taking the charger with me when I leave home so I wouldn't be left without my phone...I don't know if I could manage without it...it's my best friend... (refugee, 52 years old)*

Therefore, the social groups created provide a safe environment where they can establish friendships with both locals and other refugees, alleviating the loneliness and psychological stress related to their experiences. They contribute to creating a sense of belonging and trust in the host community, thus helping them manage trauma and regain self-confidence.

By actively engaging local people, these groups contribute to creating a more welcoming and inclusive host society, which is essential for successful integration. The social connections facilitated by these groups can also open doors to employment or volunteering opportunities, crucial for long-term economic independence and social integration.

For study participants, this multiplicity of uses led not only to a strong emotional attachment to their smartphones, but also to a technical-material dependence on the functioning of smartphones ( Gillespie et al., 2018 ).

This combination of attachment and dependency seems to be a key feature of refugee life, where devices form the constant basis of daily practices in terms of managing both the new environment and the social network of relationships that has moved into the digital sphere. Smartphones have become a key tool in several areas of refugees' lives and have helped them cope with everyday challenges. In this context, we asked respondents to name their top five most important apps that they used the most. The most frequently mentioned were Facebook, WhatsApp, Waze, Instagram and Google Translat.



Consequently, the interviewees described their smartphones as their *confidant, the best friend, or right hand*. When asked how they would feel without a smartphone, they replied:

*A phone is no longer a fad....it is a necessity....you can no longer live without it...(refugee, 52 years old)*

*If you are not connected to the internet...it is as if you do not exist, you miss out on a lot of important information for yourself and your family(refugee, 44 years old)*

*When I leave home and if I forget my phone....I don't feel good...I can't wait to get back to see if someone called me...(refugee, 37 years old)*

The study shows an explicit dependence of Ukrainian refugees on mobile applications to satisfy their needs in achieving their ultimate goal of social inclusion, with digitalization becoming a new normal in their social life, which they certainly cannot resist or simply ignore.

## 5. Conclusions and recommendations

We analyzed the use of digital technology by a group of Ukrainian refugees settled in Romania, specifically in the Rădăuți city, as a way to explore how digital technology contributed to their social and professional inclusion. We suggest that, for such individuals, socio-professional inclusion represents the extent to which they are able to function effectively in their new society and regain control over their displaced and disrupted lives. Our empirical analysis suggests three digital technology-based capabilities that underpinned their integration: *solving everyday problems with the help of digital technology, everyday communication and learning the Romanian language, social networks and access to information*.

In the host community, refugees faced severe challenges both emotionally due to the trauma they suffered, as well as material, informational, and even cultural challenges, which they were able to overcome with the help of their smartphones, as this study illustrated. Internet connectivity has unlocked new and faster ways of communicating, accessing information, and social and educational services, bringing new opportunities, in a relatively short time.

This study highlights that Ukrainian refugees had access to information from social networks, often through the use of smartphones, before and during their migration and after settling in Romania. We can characterize them as *smart refugees* – referring not only to the *smart* phones with distinct multimedia capabilities (Madianou, 2014), but also to what they gained by using this device: information and communication resources that are essential for the development of *smart* migration strategies (Dekker, et al., 2018) and integration into the host community.

Respondents identified different tools, ways and methods for their integration and inclusion in the Rădăuți city community, such as: social services, language courses, social participation initiatives, counseling, direct support in finding a job, from consultancy to employment, ensuring access to decent housing, integrating children in the educational process. These were mostly undertaken by local

authorities, NGOs or civil society organizations. Digital solutions can facilitate the use of these tools and ease the burden on these organizations.

It is important that in the future local institutions provide refugees with a list of freely available applications for the everyday context of the host city, which would reduce the costs of supporting informal and autonomous learning, identifying jobs and social services available for this category of vulnerable people - and, therefore, accelerate social inclusion.

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## Noise Levels In Medieval Towns In Transylvania. Case Study: Bistrița

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### **Abstract:**

In the context of contemporary concerns about the quality of the urban environment, this research investigates noise levels in medieval towns in Transylvania, with a case study applied in Bistrița. The main aim is to assess the current noise impact in historic areas in relation to the inherited urban structure and contemporary social dynamics. The methodology included acoustic field measurements taken with a class II sound level meter in different time intervals and functional areas, followed by data processing in MATLAB and spatial representation using dbmaps. The results indicate significant variations in noise levels depending on the type of urban activities, with high values in commercial and transit areas, even in the protected perimeter of the historic centre. Analysis reveals an antagonism between the preservation of heritage and the noise pressures associated with tourism, traffic, and social activities, indicating an emerging need for regulations tailored to the local context. The research advances a multifaceted awareness of the medieval city soundscape in our times by theorising an integrated approach of urban geography, environmental acoustics and sustainable urban planning with direct quality of life and historic area protection policy implications.

**Keywords:** *urban noise, medieval town, environmental acoustics, social dimension of acoustics, Bistrița*

### **1. Introduction**

The "urban quality of life" has, in fact, come to the forefront of concern in the geographic, urban planning and environmental science fields in recent decades, mirroring a change in thinking from quantitative growth of cities to qualitative growth, focusing on the well-being of urban residents and the sustainability of the constructed environment. Among the aspects that directly affect the urban life quality perception, there is noise pollution, a plague that is too often underestimated in city design, and with tremendous impact on body and mind, on social interaction, and on the value of age-old architectural solutions (Goines & Hagler, 2007; Murphy & King, 2014).

The medieval towns of Central and Eastern Europe, Transylvania included, stand aside; their morphology is tight, their street system adapted to the pre-modern tradition and the concentration of activities is intensified in the centre.

Even if these features bear historical and cultural importance, they could aggravate the susceptibility to modern-day noise strains such as those from touristic, road, commercial and social sources (Licitra, 2012; Kang & Schulte-Fortkamp, 2016). The study of urban noise in medieval cities is not just a technical investigation, but an interdisciplinary exploration with direct implications for heritage protection policies, sustainable planning and spatial justice. In Transylvania, cities like Bistrița boast historic centres which are preserved and included in the tourist and cultural circuit, but are subject to a permanent exposure to noise-producing activities. In this

respect, the sound analysis enables the tool to evaluate whether the contemporary uses are compatible with the urban form inherited (Botteldooren et al., 2011; Aletta et al., 2016).

And even in Romania, the study of urban city acoustics is as yet in its infancy, and when it comes to medieval cities, such studies do not yet exist that correlate sound data with spatial and social practice. The study is therefore a response to this deficit, and it also forms an empirical basis for the elaboration of local regulations, adapted to the specific urban and cultural context of the Transylvanian cities.

The present research aims to investigate noise levels in the medieval city of Bistrița, using an integrated methodology combining acoustic field measurements, digital data processing and spatial representation. The main goal is to assess the noise impact in historic areas in relation to the inherited urban structure and current social dynamics. The relevance of the research lies in its ability to generate knowledge applicable in urban planning, heritage protection and local public policy formulation. The international literature on noise in cities is extensive and covers such subjects as perception of noise (Brown & Muhar, 2004), noise mapping (Maisonneuve et al., 2010), effects of noise on health (Basner et al., 2014), as well as the integration of acoustics into the urban environment (Kang, 2007). In Europe, the Environmental Noise Directive 2002/49/EC has led to the production of noise maps and action plans to reduce noise in major cities.

In Romania, investigations are conducted on a smaller scale, focusing on larger cities and industrial or traffic noise sources (Munteanu et al., 2019). Medieval cities, except for a handful of brief investigations conducted in Sibiu or Brașov, have not received systematic attention from an acoustic angle. However, although a city renowned for the strength of its historical identity, it has no official acoustic map.

A recent research in the journal *Processes* MDPI presents a new way of mapping acoustic comfort at the urban scale, considering noise levels along with how residents perceive those noise levels (Zarei, F. et al., 2024). The study underlines the fact that in cities with historical heritage like Bistrița, the perception of noise is not only a matter of physical comfort, but also a cultural and identity one. There is a certain tolerance among residents for certain noise (e.g. traditional cultural or commercial activities), but there is friction when noise is deemed too loud or too intrusive or clashing with the character of the place (Zarei, F. et al., 2024).

This social aspect is crucial regarding the development of local noise policies, since it entails and demands that the public is involved in the process of defining quiet areas, assessing noise impact, and prioritising actions (Zarei, F. et al., 2024).

In the case of Bistrița, feeding noise maps with community input might lead to better historic centre protection and to more just urban planning.

The study proposes an integrated approach based on three pillars: urban geography, environmental acoustics and sustainable planning. By using a Class II sound level meter and measuring at different time intervals, and then processing the data in MATLAB (Tătar, 2025), the research provides a detailed picture of the spatial distribution of noise. The dbmaps representation allows the visualisation of noise differences between commercial, residential and transit areas, highlighting the tensions between functionality and heritage protection (Murphy & King, 2016; Aletta et al., 2018).

The main hypothesis is that the historic areas of Bistrița, although formally protected, are exposed to high noise levels, incompatible with their cultural and touristic function. It is assumed that commercial activities and road traffic generate significant noise pressures, and the lack of local regulations contributes to perpetuating this situation. The analysis aims to confirm these hypotheses by correlating acoustic data with the functional typology of urban spaces.

The findings show important fluctuations in noise levels by type of urban activity, with extreme values in commercial and transit areas, also including the protected perimeter of the historic centre. It reflects a tension between heritage protection, and the noise demands of tourism and urban transport. This study demonstrates the importance of specific local regulations that consider acoustics as an integral part of urban planning and the protection of quality of life in historical districts.

## **2. Methodology**

For better organisation and coherence, the methodology has been structured as follows :

### **A. Study area and period**

The analysis is conducted on the urban area of Bistrița municipality in the Bistrița-Năsăud County, Romania. Noise levels were monitored in field actions in the following locations: Central Square, Passages I–XIII, Ecaterina Teodoroiu Street, Albert Berger Street, Parcului Street, Dornei Street, Ion Minulescu Street, and Small Square. During the September–October period, decibel level measurements were conducted in the specified area. The noise sources identified and included in the study were: the bells of the Evangelical Church, road traffic, and commercial and craft-related activities in the Historic Centre of the city. Daytime and nighttime cumulative noise levels were determined for weekdays and weekends, at the best meteorological conditions (no wind, no rain).

### **B. Equipment and technical parameters**

Noise was measured with the SNDWAY SW-523 sound level meter on mobile and on fixed tripods.

The instrument meets the requirements of the standards ISO 9613-2, SR 10009, SR 6161 and is a Class 2 instrument according to the IEC 61672-1 with a measurement uncertainty of 1.5 dB.

This scale of accuracy is appropriate for outdoor environmental monitoring and urban cognitive evaluations as suggested by the World Health Organisation (WHO), Directive 2002/49/EC, and Romanian Law No. 121/2019.

The calibration was done before each series of measurements, and active noise reduction was obtained with the use of high-quality headphones. (Figure 1)



**Figure 1.** Class 2 Sonometer used in the study

*Source:* Realised by the author

Other technical data for SNDWAY 523 professional sound level meter plus decibel meter (<https://www.optimusat.ro/>):

- The microphone is a condenser microphone.
- It has analogue inputs and outputs.
- It is resistant to dust, water and drops from a height of 1.5 meters.
- Measurement range: 30~130dBA
- Accuracy:  $\pm 1.5\text{dB}$ ; Resolution: 0.1dB.
- Frequency Range: 31.5HZ ~ 8KHZ; -Frequency Weighting: A
- Sampling frequency: 2 times/sec; Auto Power Off - Low Battery Indication; Max Hold function.
- Operating conditions :Temperature: 0 ~ 40 °C (32 ~ 104 °F), Humidity: 10 ~ 80% RH
- Storage conditions :Temperature: -10 ~ 60 °C (14 ~ 140 °F); Humidity: 10 ~ 70% RH.
- Power supply: 3 x AAA LR6 batteries ;Dimensions: 200 x 60 x 27 mm

#### C. Measurement Protocol

At all locations, background noise monitoring was carried out for 30 min (with recording every 120 seconds) to record C-weighted sound levels (dBC).

dBC was used to perform a more objective assessment of low-frequency noise sources such as diesel engines, trucks and buses, which are typically underweighted by dBA filtering.

This dual-scale approach allowed a better overall quantification of urban noise pollution, also taking into account vibrational and impact-punitive aspects. Support: Tripod for support ( fixed and movable point), calibration and headphones for isolation and range sound detection.

Optimal weather conditions ( no wind, rain ) in 100% of the cases.

#### D. Data Organisation and Analysis

Individual measurements were obtained and organised into four groups (one for each thematic cluster: traffic corridors, residential areas, shopping streets and squares, and green areas). The raw data were extracted and processed with MATLAB to perform numerical analysis and spectral analysis, which included peak detection, frequency distribution and time variation. A spatial visualisation of the noise map was then created using dBmaps, which is a GIS tool for acoustic cartography. This combined approach guaranteed that the analysis was both rigorous and spatially meaningful.

Mentioned: To validate and complement the acoustic measurements made with the SNDWAY SW-523 Plus sound level meter, I used a triangular method composed of direct field observation, analysis of digital acoustic maps (dBmaps), MATLAB simulations, tripod mounting and the use of headphones for filtering ambient noise.

This integrated approach allowed comparison of recorded values with modelled estimates and contextual auditory perception, providing a comprehensive picture of the intensity and spatial distribution of urban noise. By triangulation, we reduced the risk of instrument errors and strengthened the ecological validity of the data.

### 3. Results

Map 1: 1.5 m Height Decibel Distribution. This map is based on refined measurements of the noise level at pedestrian level, at which point the social, touristic and commercial uses of the space generate the greatest concentration of people. The values recorded, 54.1 dB and 66.1 dB, represent relevant sound pressure in areas of transit and business, also in the area inside the walls of the historic centre. The chromatic scale points out a spontaneous acoustic zoning, with noise aggregation in the most visited locations. (Figure 2)

One distinctive feature is the bells of the Evangelical Church, which produce a localised peak in sound level with a very slow decay. While these sounds have symbolic and cultural significance, they may also result in the surpassing of thresholds of auditory comfort – particularly if occurring over multiple occasions or combined with other sources of noise. In this perspective, the bells are at once an acoustic marker of identity and a complexity factor in the analysis of the city.



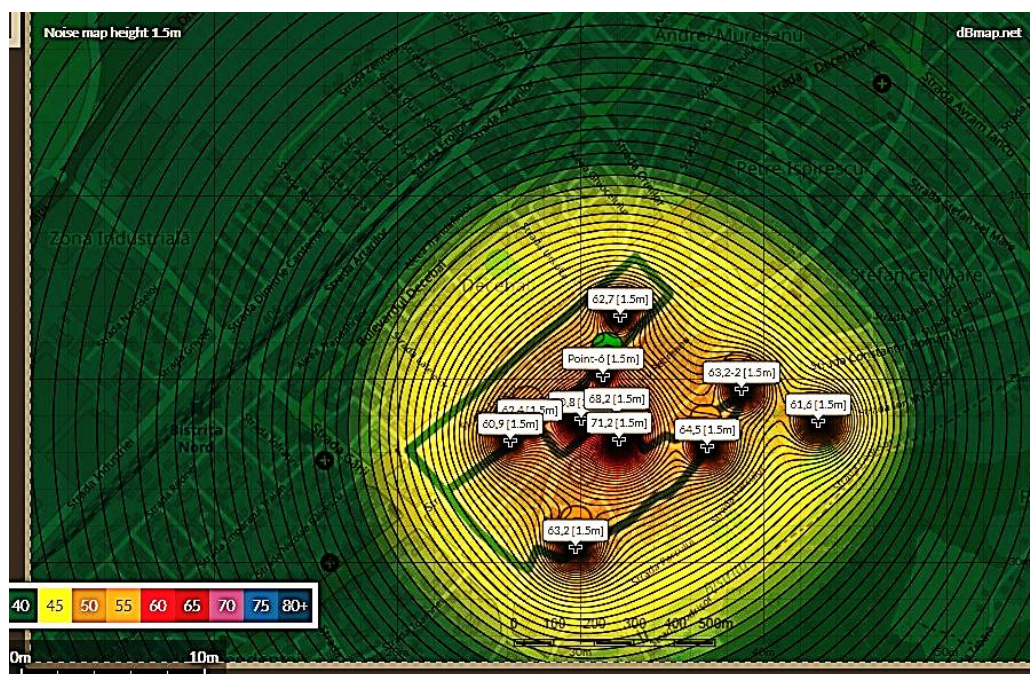


**Figure 2.** Maps 1 analyses  
Source: Realised by the author

Map 2: Network of Measurement Points and Influence Radii (61.5 m). The second map offers a perspective on the spatial extension of sound influence within the medieval urban environment. The evenly distributed measurement points and concentric radii ranging from 100 to 500 meters enable the modelling of noise propagation according to street morphology. The blue path connects points with high pedestrian and vehicular flow potential, suggesting the existence of persistent sonic corridors. (Figure 3)

In the vicinity of the Evangelical Church, there is an overlap between the influence zones of the bells and those of traffic, which may generate acoustic interference and complicate source delineation. This area thus becomes a complex acoustic nucleus, where noise perception is shaped by both physical intensity and cultural significance.

Within the research framework, the analysed noise maps reflect longitudinal sound waves, with emphasis on low- and mid-frequency acoustic waves filtered through the dBC regime. This methodological approach allows for a more accurate assessment of urban noise sources with a vibrational component, such as heavy traffic, diesel engines, and church bells, which are underrepresented in dBA filtering.

For Map 2 (Figure 3), the spherical propagation of sound waves is distinctly noticeable, characteristic of the Evangelical Church bells—a high-altitude, airborne point source with multidirectional sound emissions. Unlike road traffic, which generates linear waves along street axes, the bells produce acoustic waves that radiate in all directions, including vertically and obliquely, influencing a wide area of the historic centre.

This spherical propagation is visible in the map's concentric circles, which indicate the acoustic influence zones of the bells, with gradual attenuation depending on distance. In the context of medieval morphology—with narrow streets and reflective facades—sound waves may undergo multiple reflections, generating acoustic interference and localised amplifications.

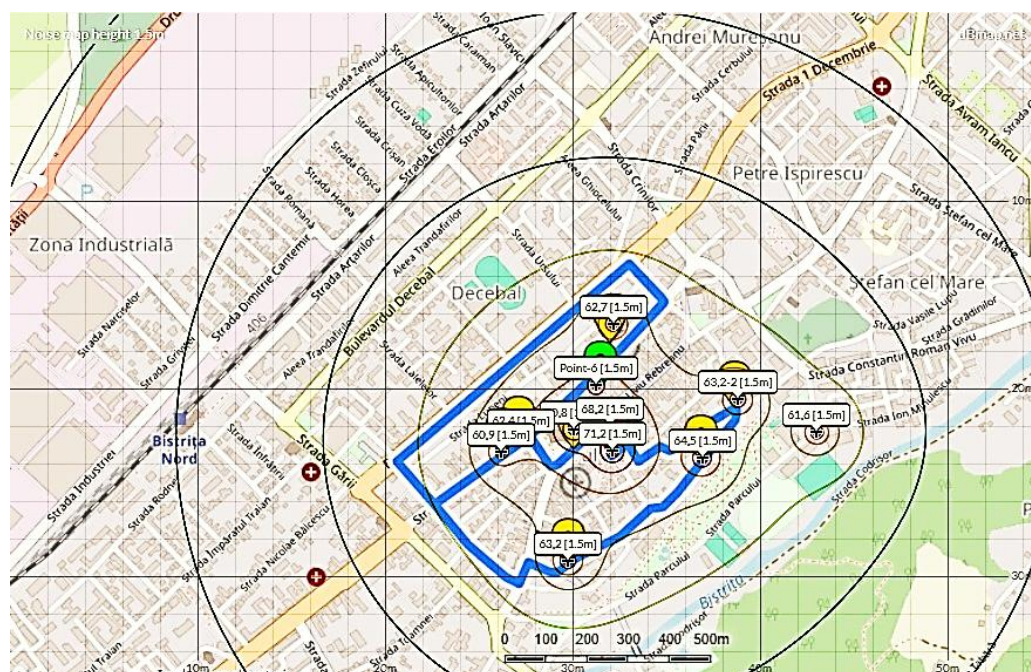


**Figure 3.** Maps 2 analyses  
Source: Realised by the author

The acoustic waves generated by historical church bells propagate spherically from elevated point sources, influencing not only the immediate surroundings but also distant urban areas due to their multidirectional emission and interaction with built morphology. In medieval cities, narrow streets and reflective facades amplify these effects, creating zones of acoustic interference and prolonged reverberation (Nastri & Todisco, 2025).

Evangelical Church in Bistrița: the bells are raised to a high point type aerial acoustic source, which promotes a spherical sound wave propagation. This type of emission presents a sound propagation in all directions at a horizontal, vertical and oblique angle with a progressive attenuation considered distance and architectural barriers. Tirpeș notes that the effect of wave reflection is important, and this effect can cause special sound effects in the streets, bumps of sound and can be superimposed over other sound sources, such as road traffic, in a medieval city with narrow streets and reflective façades like Bistrița.

This spherical propagation is confirmed by the spherical propagation in the acoustic impact map, showing the impact areas of the sound of the bells represented by concentric circles during the study.



Unlike the linear noise of traffic, which is contained by the axes of the streets, the sound of the bells is volumetric, reaching areas that are not accessible to visual control.

And this has implications not just for acoustic studies but for city planning too, since it contributes to the creation of spaces where good auditory comfort and the symbolic meaning of space can be enhanced.

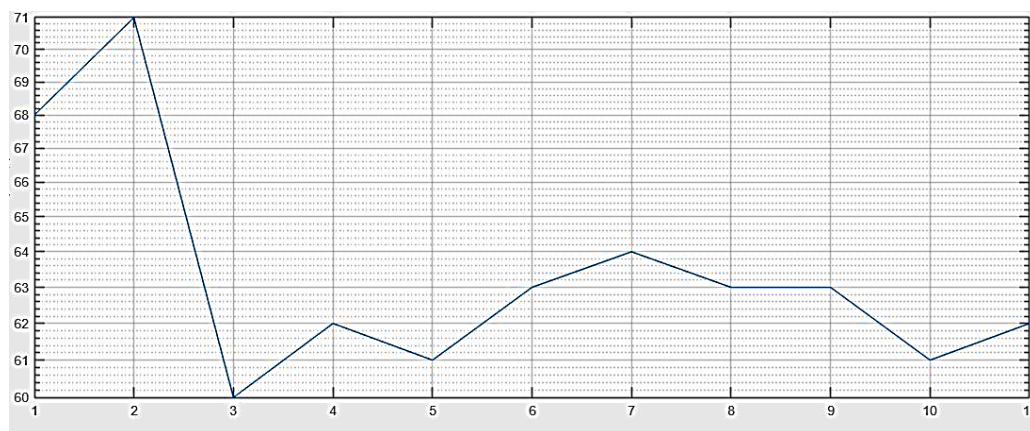


**Figure 4.** Line graph data analyses  
Source: <https://www.mathworks.com/>

The chart shows the changes in the sound level (dB) at each of the 11 points ( $x = 1-11$ ) with the sound pressure level reaching a local maximum at  $x = 2$  (approximately 71 dB) then dropping significantly at  $x = 3$  (approximately 61 dB) and leveling off between 61 and 64 dB for the rest of the points. (Figure4)

The acoustic maximum at  $x = 2$  corresponds to a key area in a noise exposure sense where hearing discomfort and functional-heritage conflict may occur. The following attenuation, convergence and overlap imply that a kind of buffer zone or an acoustic transition zone may exist where the SPLs are equalised or normalised.

The Importance of Social Perception and Cultural Context in Assessing Urban Noise (Ahmed Mustafa Jaff et al., 2023). In the context of medieval cities such as Bistrița, acoustic analysis extends beyond technical measurements, becoming a tool for understanding the relationship between space, community, and sonic identity. The two acoustic maps developed in the study — the distribution of decibel levels at pedestrian scale and the network of sonic influence — reveal overlapping zones between symbolic sources (e.g., church bells) and functional sources (e.g., road traffic), generating complex acoustic nuclei. These zones can influence residents' perceptions of urban comfort as well as the cultural value of space. Integrating the social dimension into this analysis enables the identification of noise conflict areas and the formulation of solutions that reflect both community needs and heritage preservation. Thus, noise mapping becomes an act of spatial justice, in which the voices of residents contribute to shaping a balanced and sustainable soundscape.

#### 4. Conclusion

The study of acoustics in medieval Bistrița supports the general assumption: although historic areas are shielded in a legal sense, they are subjected to high noise levels that are not compatible with their cultural and touristic role. This is not speculation, but rather measurements, acoustic mapping, spectroscopy conducted with devices that are compliant to international standards (IEC 61672-1, ISO 9613-2) and analysed via MATLAB and dbmaps. In terms of its application, the study provides a sound and reproducible model for the evaluation of sound pressure in historic centres, with implications for local governments, conservation-based urban planning and public health policies..

From an applied perspective, the research offers a replicable model for assessing sound pressure in historic centres, with relevance for local administrations, conservation-oriented urban planning, and public health policies. The use of the SNDWAY SW-523 Plus sound level meter, mounted on a tripod and calibrated before each session, enabled the collection of reliable data with an uncertainty of  $\pm 1.5$  dB. Dual-channel recording (dBA and dBC) allowed the identification of noise sources with vibrational components — such as diesel engines, heavy traffic, and church bells — which are often underestimated in conventional acoustic assessments. Acoustic mapping via dbmaps revealed two distinct types of sound distribution: a linear pattern associated with road traffic, and a spherical pattern generated by the bells of the Evangelical Church.

This distinction is necessary to define the zones of acoustic influence and to develop appropriate regulations for the source type. For example, spherical sources (e.g., bells) need vertical and oblique mitigation measures (such as rooftop sound barriers or acoustic curtains on building façades), while line sources can be mitigated by sound-absorbing pavements, speed controls, or traffic management.

The sound pressure level variations (Figure 4) exhibit a local maximum ( $\sim 71$  dB) at  $x=2$ , which is then followed by a strong attenuation. This fluctuation suggests the presence of buffer zones or acoustic transition areas, which can be leveraged in spatial planning as equilibrium perimeters between activity and noise protection. Concretely, these zones may be transformed into green spaces with sound absorption roles, pedestrian passages with controlled acoustic regimes, or interface areas between commercial and residential functions.

Moreover, the results can inform the design of tourist routes with controlled acoustic profiles. Zones with high sound pressure may be avoided or reconfigured, while those with moderate levels can be promoted as spaces for relaxation and urban contemplation. In this sense, acoustic maps become tools for tourist orientation, urban marketing, and civic education.

The study carried out in Bistrița confirms the assertion of extreme noise exposure in historic centres and, at the same time, presents an applied model for monitoring, controlling and managing urban noise in cities of the medieval type. By including the social aspect, using a sound methodology, and suggesting specific technical measures, the work lays the foundation for sustainable acoustic urbanism — a heritage, function, and quality of life scenario.

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## **Loneliness among Older Adults in Contemporary Sociological Literature: Trends, Controversies and Research Agendas**

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### **Abstract:**

*Loneliness in later life has emerged as a central concern in contemporary sociology because it concentrates broader transformations in demographic ageing, social inequality, institutional arrangements of care, and changing cultural expectations surrounding relationships, autonomy, and belonging. This article provides a synthetic analysis of the 20 most-cited peer-reviewed articles published between 2023 and 2025 that explicitly focus on loneliness among older adults, with emphasis on sociological and social-gerontological contributions. Rather than treating loneliness primarily as an individual psychological state, the reviewed literature increasingly conceptualizes it as a socially produced and institutionally patterned condition shaped by care environments, migration and minority status, stigma, and normative relational expectations. At the same time, the field has become more reflexive about measurement, demonstrating that prevalence estimates and trend claims are contingent on instruments, modes of data collection, and cultural context. Intervention research has similarly shifted from generic activity-based solutions toward a sociological understanding of interventions as embedded within social infrastructures, organizational routines, and local ecosystems of care. Building on convergences and tensions within this influential corpus, the article identifies key controversies concerning conceptual boundaries between loneliness and social isolation, causal directionality and feedback loops with health, cross-cultural comparability, and the political implications of framing loneliness as an epidemic. From this synthesis, the article articulates a forward-looking research agenda centered on life-course and chronicity-sensitive models, culturally grounded yet comparative measurement strategies, meso-level institutional analysis of care and community settings, intersectional approaches to inequality, and theory-driven evaluation of interventions. Taken together, the analysis positions loneliness in later life not as an individual deficit but as a social outcome reflecting how contemporary societies organize belonging, recognition, and access to meaningful participation in older age.*

**Keywords:** loneliness; older adults; ageing; social gerontology; social inequality; institutional care; measurement and prevalence; interventions; stigma; life-course perspective

### **1.Introduction**

Within contemporary human rights frameworks, loneliness in later life can be understood not merely as an individual emotional condition, but as a socially produced vulnerability that intersects with fundamental rights related to dignity, participation, and social inclusion. International and national human rights discourses increasingly recognize that the right to a dignified life entails more than protection from material deprivation; it also presupposes meaningful access to social relations, institutional support, and opportunities for participation in community life (Otovescu, 2009). From this perspective, persistent loneliness among older adults signals potential failures of social

systems to uphold relational dimensions of human dignity, particularly in contexts marked by demographic ageing, shrinking family networks, and the institutionalization of care. As Otovescu (2009) argues, the culture of human rights in contemporary societies must be evaluated not only through formal legal guarantees but also through everyday social practices and institutional arrangements that enable—or constrain—individuals’ capacity to belong, to be heard, and to remain socially visible. Loneliness thus emerges as a critical sociological indicator of how effectively human rights principles are translated into lived social realities for ageing populations.

Loneliness in later life has become a focal object of contemporary social inquiry because it crystallizes the interaction between demographic change, social inequality, institutional arrangements of care, and shifting cultural expectations about relationships, autonomy, and belonging. Drawing on the most influential recent scholarship, this article synthesizes evidence and arguments from the 20 most-cited peer-reviewed scientific articles (2023–2025) that explicitly center loneliness among older adults, with priority given to sociological and social-gerontological orientations and to works widely used in sociological debates about ageing, inequality, and social policy. Across this corpus, three meta-level developments stand out. First, the field has moved from treating loneliness mainly as an individualized psychological state toward specifying multi-level social mechanisms and contexts that produce, organize, and legitimize loneliness, including institutional care environments, migration and minority status, and stigma processes (Akhter-Khan et al., 2023; Joshi et al., 2025; Neves & Petersen, 2025; Zhang, Lu, et al., 2023). Second, the literature has become increasingly “measurement-aware,” foregrounding how prevalence estimates depend on scale choice, mode of data collection, and cross-national comparability, which complicates claims about “how much” loneliness exists and whether it is rising (Schroyen et al., 2023; Stegen et al., 2024; Su et al., 2023). Third, intervention research has shifted from generic “social activities” toward questions of mechanism, local implementation, and fit between program designs and older adults’ relational expectations, leading to a more explicitly sociological treatment of interventions as social and institutional arrangements rather than merely individual treatments (Duffner et al., 2024; McDaid & Park, 2024; Paquet et al., 2023; Patil & Braun, 2024).

The imposition of home confinement during the emergency period functioned as a powerful amplifier of loneliness and social anxiety, particularly for groups already positioned at the margins of everyday interaction. While a majority of the population experienced the pandemic within family settings, a non-negligible share of individuals—disproportionately older adults and women—lived alone throughout this period, resulting in sharply unequal experiences of isolation. For older adults living alone, mobility restrictions did not merely reduce social contact but often suspended it almost entirely, converting administrative isolation into lived solitude (Otovescu, 2022: 66). This pattern underscores the socially differentiated effects of crisis governance: uniform public-health measures can generate uneven relational consequences depending on living arrangements, gender, and age. In this sense, pandemic restrictions did not create loneliness *ex nihilo*, but intensified pre-existing vulnerabilities, revealing how policies designed to protect physical health can simultaneously deepen social disconnection among structurally exposed populations (Otovescu, 2022: 67).



A defining background condition for the recent literature is the COVID-19 pandemic, which operated simultaneously as an empirical accelerator and as a critical social juncture in the study of loneliness in later life. In its early phase, the scale of contagion across Europe was initially limited, with relatively low numbers of confirmed cases distributed unevenly across countries. This early containment window, however, was followed by rapid and highly uneven escalation, most notably in contexts characterized by dense urban interaction and in institutional settings of elder care (Otovescu, 2022: 40). The explosive spread observed in such environments exposed the structural vulnerability of older adults not simply to infection, but to the social consequences of crisis governance. Restrictions on mobility, visitation bans in residential care, and the suspension of routine social services transformed everyday sociality into a regulated risk, rendering loneliness a foreseeable outcome of public-health decision-making rather than an unintended side effect. In this sense, the pandemic revealed how loneliness among older adults can be produced through institutional logics designed to protect life, yet implemented in ways that fracture relational infrastructures.

At the same time, the pandemic reshaped the research field itself by generating both an urgency to quantify loneliness and a rapid expansion of synthetic knowledge production. The prominence of large-scale reviews and meta-analyses in the 2023–2025 period reflects not only scientific accumulation but also political and media pressures to provide aggregate prevalence figures capable of informing policy responses. However, qualitative and experience-centered studies within the same corpus demonstrate that pandemic-related loneliness was rarely a wholly new phenomenon. Instead, it intensified pre-existing trajectories shaped by living arrangements, health status, care dependency, and institutional positioning, particularly in long-term care facilities and socially segregated urban settings. The pandemic thus functioned less as a singular cause of loneliness and more as a magnifying lens, making visible how unequal access to social contact, care infrastructures, and institutional flexibility structures vulnerability in later life—patterns that continue to inform post-pandemic sociological debates on ageing, inequality, and social policy.

The synthesis highlights enduring controversies—especially the loneliness/social isolation distinction, causal inference and feedback loops with health, cross-cultural validity of core constructs, and the political consequences of framing loneliness as an “epidemic”. Building on convergences and tensions in the top-cited literature, the article proposes a research agenda centered on life-course and intersectional stratification, culturally grounded measurement, meso-level institutional ethnography of care and community infrastructures, and theory-driven evaluation of interventions at scale.

Finally, in order to anchor this discussion within a sociological perspective that rigorously articulates the tension between the “structural” level of the phenomenon and its lived experience, reference can be made to my analysis of loneliness as a simultaneously objective and subjective condition: on the one hand, it derives from measurable social conditions (relational networks, institutional arrangements of care, inequalities, organizational routines, access to participation), while on the other hand it gains meaning through

interpretations, normative expectations, and affective biographies that give substance to the experience of “being alone” (Cioacă, 2025). From this perspective, loneliness in later life can be understood as an indicator of how society organizes belonging and recognition, and its variations cannot be adequately explained either through inventories of risk factors or strictly psychological approaches, but rather through an integration of institutional mechanisms and lived meanings, with direct implications for how interventions and public policies are conceptualized (Cioacă, 2025).

## 2. Corpus and approach

This review is anchored in a purposive bibliometric strategy: identifying 2023–2025 journal articles whose titles and abstracts indicate a primary focus on loneliness among older adults (typically defined as 60+ or 65+, but also including older-adult samples in community and institutional settings), then retaining the 20 highest-cited items within that set. Citation counts were compiled as displayed on major indexing or publisher pages (most often PubMed for biomedical-indexed journals, Cambridge Core, Wiley, SAGE, and Nature/Palgrave for social-science venues) as of February 1, 2026. Because citation metrics differ by database and update schedules, counts should be interpreted as comparable indicators of influence within this defined search window rather than as a single definitive cross-database ranking. The analytic aim is not merely to summarize results but to map how influential recent work constructs loneliness as a social phenomenon, what empirical strategies dominate, where disagreements persist, and how a next-wave sociological agenda can be articulated from the field’s own most-cited reference points.

Table 1 provides a structured overview of the 20-article corpus, including citation counts, methods, and the primary thematic contribution each work makes to sociological understandings of later-life loneliness.

**Table 1.** Comparative profile of the 20 most-cited 2023–2025 articles focusing on loneliness among older adults (citation counts as displayed on major indexing/publisher pages)

| Article<br>(APA short<br>citation) | Citations | Design /<br>Method                                                      | Population<br>/ Setting                              | Core<br>Thematic<br>Focus                                  | Key Contribution to Sociological<br>Understanding                                                                                                                                                 |
|------------------------------------|-----------|-------------------------------------------------------------------------|------------------------------------------------------|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Su et al.,<br>2023                 | 280       | Systematic<br>review &<br>meta-<br>analysis                             | Older adults;<br>COVID-19<br>pandemic<br>studies     | Prevalence<br>under<br>pandemic<br>conditions              | Positions loneliness as a population-level vulnerability produced by public-health regimes and disrupted social routines; emphasizes heterogeneity and the need for longitudinal social research. |
| Paquet et<br>al., 2023             | 128       | Meta-review<br>+ integration<br>with<br>practice-<br>based<br>resources | Older adults;<br>multi-<br>intervention<br>landscape | Social<br>prescribing<br>and<br>intervention<br>typologies | Frames interventions as social infrastructures and implementation ecosystems; develops an ontology-like framework linking evidence to real-world services.                                        |
| Akhter-<br>Khan et<br>al., 2023    | 140       | Theory-<br>building and<br>integrative<br>synthesis                     | Older adults<br>across<br>diverse<br>contexts        | Relational<br>expectations                                 | Reorients loneliness toward normative expectations and relational meaning, linking social change and ageing to mismatches between expected and actual relationships.                              |

|                            |     |                                                    |                                                      |                                             |                                                                                                                                                                     |
|----------------------------|-----|----------------------------------------------------|------------------------------------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Zhang, Kuang, et al., 2023 | 114 | Longitudinal cohort study                          | Older adults in Shanghai                             | Loneliness–isolation–mental health dynamics | Demonstrates reinforcing pathways among loneliness, social isolation, and depression, supporting sociological models of cumulative disadvantage and feedback loops. |
| Kadowaki & Wister, 2023    | 65  | Integrated review + grey-literature analysis       | Community-dwelling older adults; pandemic context    | Patterns, effects, interventions            | Applies socio-ecological and resilience frameworks, emphasizing community and system-level responses beyond individual coping strategies.                           |
| Deng et al., 2023          | 44  | Systematic review & meta-analysis                  | Older adults (multi-study samples)                   | Sleep quality as a mediating pathway        | Supports embodiment arguments: loneliness is socially produced yet physiologically consequential, linking social disconnection to health via sleep.                 |
| Neves et al., 2023         | 41  | Qualitative diary study                            | Older adults already lonely pre-pandemic (Australia) | Lived experience during lockdown            | Shows how institutional lockdown orders intersect with prior loneliness, highlighting temporalities of hope, loss, and unequal coping resources.                    |
| Schroyen et al., 2023      | 28  | Scoping review                                     | Older adults worldwide (regional comparisons)        | Prevalence and definitional boundaries      | Demonstrates wide prevalence variability and shows how definitions of loneliness versus isolation shape estimates and policy narratives.                            |
| Zhang, Lu, et al., 2023    | 37  | Qualitative meta-synthesis                         | Nursing-home residents                               | Institutional loneliness                    | Develops themes linking environmental change and loss to the social organization of loneliness in residential care settings.                                        |
| Sun et al., 2024           | 40  | Quantitative mediation/moderation models           | Older adults (survey-based)                          | Social anxiety, networks, support           | Bridges social-psychological mechanisms with network and support structures, identifying relational pathways for targeted interventions.                            |
| Stegen et al., 2024        | 33  | Systematic review & meta-analysis                  | Community-dwelling older adults                      | Measurement mode and country effects        | Shows that prevalence estimates are partly artifacts of instruments and data-collection modes, complicating cross-national and temporal comparisons.                |
| Duffner et al., 2024       | 35  | Systematic review & meta-analysis                  | Older adults; intervention studies                   | Intervention effectiveness                  | Shifts focus from outcomes to mechanisms and intervention typologies, highlighting heterogeneity between technological and non-technological approaches.            |
| Patil & Braun, 2024        | 26  | Review of reviews                                  | Older-adult loneliness interventions                 | Evidence synthesis and bias                 | Assesses review quality and consolidates intervention categories, treating effectiveness as contingent on design and contextual fit.                                |
| Mushtaq & Khan, 2024       | 26  | Scoping review                                     | Older adults during COVID-19                         | Mental health and social isolation          | Synthesizes pandemic-era social conditions, showing how loneliness is intertwined with institutional disruption and mental-health burdens.                          |
| McDaid & Park, 2024        | 17  | Qualitative program evaluation (interviews)        | Older adults in a local English program              | Program fit and uptake pathways             | Conceptualizes intervention as a social process of recruitment, legitimacy, and sustained engagement, foregrounding user experience.                                |
| Hajek et al., 2025         | 37  | Systematic review, meta-analysis & meta-regression | Older adults                                         | Chronic loneliness and isolation            | Makes chronicity a central analytic category, encouraging sociological inquiry into persistence, stratification, and structural lock-in.                            |
| Susanty et al., 2025       | 43  | Meta-analysis                                      | Older adults across continents                       | Global prevalence and risk factors          | Produces comparative prevalence estimates and correlates, supporting multi-level risk framing (health, gender, institutionalization, rurality).                     |
| Joshi et al., 2025         | 27  | Scoping review                                     | Ethnic-minority and                                  | Migration, ethnicity,                       | Advances intersectional and structural explanations (language barriers,                                                                                             |

|                        |    |                                    |                                                |                                          |                                                                                                                                                |
|------------------------|----|------------------------------------|------------------------------------------------|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
|                        |    |                                    | immigrant older adults (high-income countries) | socio-ecological mapping                 | discrimination, transnational ties) and calls for culturally sensitive measures.                                                               |
| Neves & Petersen, 2025 | 28 | Conceptual + qualitative synthesis | Older adults living alone and in care homes    | Stigma                                   | Develops a sociological theory of loneliness stigma, showing how ageism and moral judgments shape disclosure and help-seeking.                 |
| Salari et al., 2025    | 22 | Systematic review & meta-analysis  | Older adults (global samples)                  | Global prevalence and associated factors | Consolidates large-scale prevalence estimates and associated factors, reinforcing policy relevance and institutional dimensions of loneliness. |

*Source:* Author's compilation based on citation counts retrieved from publisher and indexing-platform pages (Web of Science, Scopus, Google Scholar), February 1, 2026.

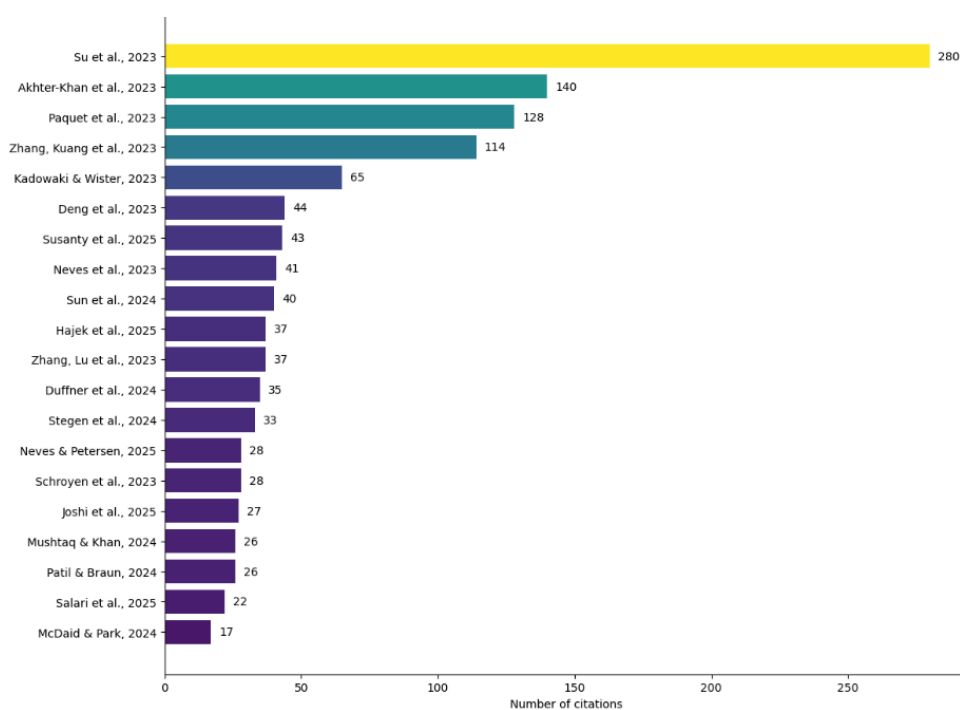


**Figure 1.** Comparative profile of the 20 most-cited 2023–2025 articles focusing on loneliness among older adults (citation counts as displayed on major indexing/publisher pages)

*Source:* Author's compilation based on citation data retrieved from major indexing and publisher platforms (February 1, 2026).

To illustrate the skewed influence structure typical of fast-moving literatures, Figure 1 summarizes the citation distribution of the corpus. A small number of meta-analyses and major syntheses concentrate the most citations, while qualitative and program-evaluation work—although foundational for sociological mechanism-building—tends to accumulate citations more slowly.

### 3. Trends

A first major trend in the 2023–2025 sociological and social-gerontological literature is the consolidation of loneliness as a population-level condition that varies systematically across social contexts rather than merely across individuals. The most-cited works are disproportionately prevalence syntheses, which have political and epistemic consequences: they provide numbers that travel into policy narratives and media claims while simultaneously revealing the fragility of those numbers. Su et al. (2023) became a highly cited anchor because it assembled pandemic-era studies and estimated that roughly three in ten older adults experienced loneliness during COVID-19, with substantial heterogeneity, thereby linking loneliness to public-health governance and the restructuring of everyday sociality. Yet this “headline prevalence” orientation is immediately complicated by the measurement-focused meta-analysis of Stegen et al. (2024), which shows that estimates depend heavily on the loneliness instrument used, how data are collected, and national context; the implication for sociological inference is that prevalence is partly co-produced by research infrastructures and cultural response patterns, not simply “out there” waiting to be measured. Schroyen et al. (2023) similarly underscores that prevalence ranges are wide and that definitional boundaries between loneliness and related constructs shape what gets counted, reinforcing the idea that sociological claims about loneliness trends must be reflexive about their epistemic foundations rather than relying on a single pooled estimate as a social fact.

A second trend is the widening of explanatory ambition from “risk factors” toward social mechanism and social meaning, especially mechanisms that connect macro social change to micro experience. Akhter-Khan et al. (2023) crystallizes this movement by arguing that older adults’ loneliness should be theorized through their social relationship expectations—availability, care, intimacy, shared enjoyment, generativity, and respect. This theoretical move is sociologically consequential because it treats loneliness not simply as absence (of contacts) but as mismatch within normative relational economies; loneliness becomes a relational verdict about whether one’s social world meets culturally and biographically shaped standards. The framework also invites attention to how retirement, widowhood, disability, migration, and neighborhood change alter both expectations and attainable relationship forms, making loneliness a diagnostic of social organization in later life rather than a purely internal feeling. This meaning-based orientation converges with the stigma-centered sociological contribution of Neves and Petersen (2025), which theorizes loneliness as morally evaluated and socially sanctioned in later life contexts, implying that loneliness is not only experienced but also managed through concealment, selective disclosure, and guarded help-seeking—behaviors that can themselves intensify loneliness by restricting connection opportunities.

A third trend is the strengthening of institutional and meso-level analysis—especially institutional care settings and community interventions—as key sites where loneliness is produced, visible, and governable. Zhang, Lu, et al. (2023) synthesizes qualitative evidence from nursing homes and identifies how relocation into institutional environments can reorganize identity, autonomy, and social ties, producing loneliness through environmental transformation and losses that are not merely interpersonal but institutionally patterned. This focus on institutional context resonates with Neves et al. (2023), which uses solicited diaries from older adults who

were lonely even before COVID-19 to show that the experience of lockdown was filtered through pre-existing loneliness trajectories and through institutional time regimes that restructured daily life; the diaries foreground how loneliness is temporally patterned (days, weeks, waves) and how resources for meaning-making and contact are unevenly distributed. Kadowaki and Wister (2023) extends this meso-level sensibility by integrating review findings with contextual Canadian evidence and emphasizing socio-ecological and resilience frameworks; their synthesis implies that loneliness in later life is partly a systems problem—about accessible outdoor spaces, intergenerational program capacity, outreach logistics, and the ability of institutions to sustain connection under crisis conditions.

A fourth trend is the rapid maturation of intervention research into a more explicitly sociological conversation about implementation, mechanisms, and institutional fit. The meta-review by Paquet et al. (2023) is influential not only because it catalogs intervention types (from group activities and support groups to ICT-based supports and home/community care) but because it attempts to connect scientific evidence to real-world service landscapes through an “on-the-ground” integration strategy. This de-emphasizes the idea that intervention efficacy is only a matter of effect sizes and instead highlights the ecology of delivery, referral, participation, and sustained engagement—features often invisible in clinical-style evaluations. Duffner et al. (2024) similarly synthesizes intervention outcomes, but their meta-analytic emphasis on mapping “working mechanisms” reinforces a shift toward explaining why interventions work (or fail) for some older adults in some contexts. Patil and Braun (2024), by explicitly evaluating review quality and bias and then narratively consolidating intervention categories, strengthens the methodological agenda of the field: intervention evidence must be treated as stratified by study design, measurement choice, and contextual fit, which is directly aligned with sociological commitments to heterogeneity and causal complexity. McDaid and Park (2024) contributes a qualitatively grounded complement: through interviews within a localized English program, they show that routes into services, perceived legitimacy, and subjective fit govern whether an intervention becomes socially meaningful rather than merely available, implying that “offerings” not embedded in trusted social pathways can fail even if they are theoretically appropriate.

A fifth trend is the increasingly explicit treatment of loneliness as dynamic and potentially self-reinforcing, including the emergence of chronicity as a central construct. The longitudinal study by Zhang, Kuang, et al. (2023) offers empirical support for vicious-circle dynamics among loneliness, social isolation, and depression: loneliness predicts later depressive symptoms, and depression can in turn shape the risk of social isolation, suggesting a feedback structure that resembles cumulative disadvantage models. Hajek et al. (2025) elevates this temporal insight into a broader analytic agenda by systematically examining chronic loneliness and chronic social isolation, using meta-analysis and meta-regression to explore prevalence and correlates of persistent forms. The sociological payoff of chronicity is substantial: it invites inquiry into which structural conditions—poverty, disability, caregiving burdens, neighborhood exclusion, migration-related barriers, stigma—convert episodic loneliness into persistent states, and how institutional routines (medicalization, eligibility rules, fragmented services) may inadvertently stabilize loneliness over time. Even studies emphasizing physiological or psychosocial pathways contribute to this

dynamic framing: Deng et al. (2023) strengthens the argument that loneliness is embodied through health-related pathways (here, sleep quality), making persistence consequential not only emotionally but also physically, which can further restrict participation and intensify social disconnection.

A sixth trend is the widening of inequality-sensitive perspectives, with migration and minority status becoming a particularly visible axis of analytic development. Joshi et al. (2025) represents an explicitly socio-ecological mapping of loneliness and social isolation among ethnic minority and immigrant older adults in high-income countries, highlighting the intersection of general ageing-related risks (health decline, bereavement) with migration- and ethnicity-specific mechanisms such as language barriers, cultural mismatch in expectations, discrimination, and fragmented trust in institutions. The review's emphasis on structural and cultural dimensions—and on the underrepresentation of discrimination in existing empirical research—moves loneliness scholarship toward classic sociological concerns: stratification, marginalization, and institutional exclusion as drivers of subjective experience. In this way, the corpus increasingly frames loneliness not simply as a distribution of individual deficits but as an outcome of unequal access to belonging, recognition, and culturally legitimate social participation.

#### **4. Controversies**

A central controversy in contemporary sociological discussions of older-adult loneliness concerns conceptual boundaries: what precisely counts as loneliness, how it differs from social isolation, and whether the distinction is analytically productive or politically distracting. Although many studies reproduce the standard distinction—loneliness as subjective discrepancy and social isolation as objective lack of contact—the most influential reviews show that research practice often blurs boundaries by using proxy measures, single-item indicators, or mixed operationalizations, which in turn shapes prevalence estimates and intervention claims. Stegen et al. (2024) demonstrates that estimates for community-dwelling older adults vary with instrument, mode, and country, implying that even when researchers claim to measure “loneliness,” they may be capturing different social experiences across contexts. Schroyen et al. (2023) further illustrates that prevalence ranges are partially an artifact of definitional and methodological heterogeneity, raising a sociological warning: policy claims that treat loneliness prevalence as a stable, comparable statistic risk reifying what is partly an outcome of measurement conventions and cultural response styles. At the same time, conceptual boundary work is not merely technical; it affects the moral and political framing of older adulthood, potentially encouraging narratives that depict older adults as uniformly isolated, thereby reinforcing ageist imaginaries that Neves and Petersen (2025) argue are part of the stigma ecology surrounding loneliness.

A second controversy concerns causality and directionality: does loneliness “cause” ill health and social withdrawal, or is it primarily a symptom of prior structural conditions and health constraints? The top-cited corpus does not resolve the issue but clarifies how causality is likely reciprocal and temporally layered. Zhang, Kuang, et al. (2023) provides evidence consistent with bidirectional pathways: loneliness predicts later depressive symptom burden, and depression predicts later social isolation risk, a pattern that supports sociological feedback models rather than one-way causal narratives. Hajek et al. (2025) intensifies the debate by focusing on chronic loneliness

and chronic social isolation, implicitly challenging short-term or cross-sectional accounts that cannot distinguish transient loneliness from persistent states with potentially distinct correlates and consequences. Deng et al. (2023), by tying loneliness to sleep quality, can be read as strengthening a “loneliness causes health problems” narrative; yet its meta-analytic design also makes visible the need for stronger longitudinal evidence and for sociologically richer models that specify how social conditions shape sleep through daily routines, stress, and resource scarcity, which then feed back into social participation. The unresolved controversy, sociologically, is not whether loneliness is “causal” but how to model causality as a multi-level process in which health, agency, stigma, and institutional access form mutually reinforcing constraints.

A third controversy is cross-cultural comparability and the question of universality versus cultural construction. Global meta-analyses such as Susanty et al. (2025) and Salari et al. (2025) offer wide-angle prevalence estimates and correlate lists that appear to support quasi-universal risk patterns (e.g., gender differences, institutionalization, health status). Yet Joshi et al. (2025) challenges the implicit universality of dominant measures and definitions by stressing that loneliness and isolation are culturally constructed and that Western-developed scales may not capture relational expectations and belongingness in familistic or minority contexts. Akhter-Khan et al. (2023) similarly emphasizes contextual factors—culture, functional limitations, network change—as shaping how relationship expectations are expressed and satisfied, implying that the same “score” may represent different social realities across settings. This tension generates a methodological and theoretical controversy: whether the field should prioritize standardized, comparable measurement (to enable global prevalence claims) or culturally grounded conceptualization (to capture social meaning and avoid category error). A sociological synthesis suggests that the field must pursue comparability without erasing difference, likely through measurement strategies that explicitly model cultural response patterns and that integrate qualitative work to validate constructs in specific communities.

A fourth controversy concerns the “interventionization” of loneliness: what kinds of responses are appropriate, and how should responsibility be distributed across individuals, communities, and the state? The intervention-focused literature shows a tension between scalable, technology-mediated solutions and relationally intensive, community-embedded approaches. Paquet et al. (2023) and Duffner et al. (2024) both map a diverse intervention landscape, including ICT-based supports, but their syntheses also imply that effectiveness depends on social fit, engagement, and the ability to sustain meaningful contact rather than simply increasing nominal interactions. Patil and Braun (2024) pushes this debate by highlighting quality and bias across reviews, suggesting that “what works” cannot be asserted without attending to methodological limitations and context. McDaid and Park (2024) sharpens the sociological critique: program uptake and perceived suitability are social processes shaped by routes of referral, trust, stigma, and personal narratives, meaning that interventions may fail not because they are theoretically misguided but because they do not align with how older adults recognize their own needs or accept help. The controversy thus concerns whether loneliness interventions should be framed primarily as individual behavior change, as service delivery and navigation, or as social-structural reform (housing, transportation, neighborhood design, anti-discrimination),



with the most sociologically aligned works pushing toward the latter without abandoning the former.

A fifth controversy, increasingly visible in stigma-focused work, concerns whether public discourse about loneliness reduces or exacerbates harm. Neves and Petersen (2025) argue that loneliness is stigmatized in later life contexts and tied to ageist assumptions; labeling and campaigns may reduce silence but can also amplify moral judgment, producing pressures to appear socially successful or “not needy.” Neves et al. (2023) shows that loneliness narratives during COVID-19 were intertwined with loss, hope, and coping; the diary method reveals that older adults may resist simple loneliness labels and instead narrate complex moral economies of endurance, gratitude, and constrained choice. From a sociological standpoint, the controversy is about representation and governance: whether portraying loneliness as an epidemic mobilizes resources or instead produces surveillance-like expectations that older adults must demonstrate sociability, potentially deepening stigma and discouraging disclosure. The corpus suggests that future sociological work must treat loneliness discourse itself as an object of study, including how categories circulate through institutions and shape what forms of help are culturally legitimate.

### **5. Research agendas**

The top-cited 2023–2025 literature implies a future research agenda that is less about discovering ever more correlates and more about building integrative, multi-level explanations that can be tested, compared, and used to design institutionally realistic interventions. One priority is to formalize life-course and chronicity-informed models that distinguish episodic from persistent loneliness and that specify transition points—retirement, bereavement, disability onset, migration, institutionalization—where social networks, expectations, and opportunities are reorganized. Hajek et al. (2025) provides a methodological and conceptual foundation for treating chronic loneliness as a distinct analytic object, while Zhang, Kuang, et al. (2023) demonstrates empirically that loneliness can participate in feedback loops with mental health and social isolation. A sociological research program should therefore develop longitudinal and mixed-method designs that capture how loneliness becomes “locked in” through cumulative disadvantage, stigma, and institutional barriers, rather than relying on cross-sectional snapshots that cannot separate causes from consequences.

A second priority is measurement development that is simultaneously comparative and culturally credible. The prevalence-focused syntheses show that the field’s most-cited outputs are often those that offer pooled estimates, yet Stegen et al. (2024) and Schroyen et al. (2023) make clear that measurement choices can change conclusions substantially. Joshi et al. (2025) adds that dominant measures may miss culturally specific meanings and belongingness dynamics in minority and migrant communities. A rigorous sociological agenda would therefore combine (a) cross-national quantitative work that explicitly models instrument and mode effects, (b) qualitative validation within specific cultural and institutional contexts, and (c) theory-informed operationalization of relational expectations as proposed by Akhter-Khan et al. (2023). In practice, this would mean treating measurement not as a technical prelim but as a substantive site where social norms, stigma, and identity shape how older adults interpret and answer loneliness questions.

A third priority concerns institutional ethnography and meso-level sociology of care, with nursing homes, home care systems, and community programs treated as social organizations that structure loneliness. Zhang, Lu, et al. (2023) suggests that institutional loneliness is produced through environmental transformation and the reconfiguration of autonomy and ties, while Neves et al. (2023) demonstrates how crisis governance reshapes everyday relational economies for those already lonely. McDaid and Park (2024) illustrates that interventions are mediated by local institutional pathways—who refers, how participants enter, what counts as success, and how engagement is sustained. Future research should therefore analyze loneliness-producing mechanisms at the level of organizational routines (staffing patterns, activity design, visiting rules, transportation access, referral infrastructures), as well as the moral and interactional order that governs whether older adults can acknowledge loneliness without shame, a theme that becomes central in Neves and Petersen (2025).

A fourth priority is to integrate inequality and intersectionality as organizing principles rather than as subgroup analyses. Joshi et al. (2025) highlights that ethnic minority and immigrant older adults face distinctive mechanisms such as linguistic isolation, cultural mismatch, and discrimination, yet these remain underrepresented empirically, especially through qualitative and longitudinal approaches. A sociological research agenda should treat loneliness as an inequality outcome: not only stratified by income, gender, and living arrangements, but also by the social recognition of one's relationships, by the legitimacy of one's needs, and by access to culturally safe spaces for participation. This approach aligns with the stigma framework of Neves and Petersen (2025), which implies that those already marginalized may experience a compounding burden: fewer resources for connection and greater moral risk in disclosing loneliness.

A fifth priority is a more theory-driven, mechanism-sensitive evaluation science for interventions. The intervention syntheses—Paquet et al. (2023), Duffner et al. (2024), and Patil and Braun (2024)—collectively imply that “effectiveness” is an insufficient end point unless researchers can specify mechanisms, contexts, and participant pathways. Paquet et al. (2023) proposes a way forward by integrating evidence with real-world resources and by emphasizing typologies that can connect interventions to service ecosystems. McDaid and Park (2024) adds that interventions should be studied as sociological processes: uptake is shaped by meaning, identity, and trust, and impacts are perceived and narrated rather than merely scored. Sociological evaluation should therefore combine quantitative outcomes with qualitative accounts of fit and meaning, and it should measure intermediate social mechanisms—recognition, belonging, reciprocity, generativity, respect—alongside loneliness scores, echoing the expectation-based framework of Akhter-Khan et al. (2023).

A sixth priority is to bridge “embodiment” and “social meaning” without collapsing one into the other. Deng et al. (2023) shows that loneliness is associated with sleep quality in older adults, and Zhang, Kuang, et al. (2023) links loneliness to depression trajectories, both suggesting that loneliness has bodily and mental health consequences. A sociological agenda should not treat these findings as proof that loneliness is fundamentally psychological or biological; instead, it should examine how social conditions—housing insecurity, neighborhood exclusion, caregiving burdens, discrimination, institutional schedules—generate stress and disrupt sleep and health, thereby reducing capacity for social participation and entrenching loneliness. The goal

would be an explicitly sociological model of health pathways that preserves the social origin of loneliness while acknowledging its physiological reality.

Finally, the corpus points to a need for research that treats public discourse and policy framing as causal forces. If loneliness is stigmatized (Neves & Petersen, 2025), and if prevalence numbers are fragile and context-sensitive (Stegen et al., 2024; Su et al., 2023), then policies built on decontextualized “epidemic” narratives risk mis-targeting resources or inadvertently reinforcing stigma. Future research should therefore analyze how loneliness categories circulate through health systems, aging services, media, and community organizations, how older adults interpret those categories, and how discourse changes help-seeking and social participation. This agenda would position loneliness scholarship firmly within sociology of ageing, aligning empirical measurement with analysis of institutions, norms, and inequality.

## 6. Conclusion

The most-cited sociological and social-gerontological literature on loneliness among older adults from 2023–2025 is both expansive and convergent in key ways. It converges on an understanding of loneliness as socially patterned, context-sensitive, and consequential—produced at the intersection of demographic transitions, institutional arrangements, cultural expectations, and unequal access to belonging. It also converges methodologically on large-scale syntheses that generate mobile prevalence estimates and intervention typologies (Paquet et al., 2023; Salari et al., 2025; Stegen et al., 2024; Su et al., 2023; Susanty et al., 2025), while relying on qualitative and theory-building work to reveal meaning, stigma, and institutional mechanisms that numbers alone cannot capture (Neves et al., 2023; Neves & Petersen, 2025; Zhang, Lu, et al., 2023). The central controversies—conceptual boundaries, causal inference, cross-cultural comparability, and the politics of intervention—are not signs of immaturity but indicators that loneliness has become a genuinely sociological object, implicating measurement, morality, institutions, and inequality in the production of subjective experience.

A forward-looking sociological research program, grounded in the field’s most influential recent work, should prioritize longitudinal and mixed-method designs attentive to chronicity and life-course transitions; culturally grounded yet comparable measurement; institutional analysis of care and community infrastructures; intersectional inequality frameworks; and mechanism-based evaluation of interventions embedded in real service ecosystems. Such a program would move beyond treating loneliness as a problem located in older individuals and instead analyze it as a social outcome—one that reflects how contemporary societies distribute connection, recognition, and the practical means of participation in later life.

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## Professionals' Perception Regarding the Impact of the Sanction of Deprivation of Parental Rights

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### **Abstract:**

*The sanction of deprivation of parental rights is not a viable solution every time, especially since its alternatives are limited. Protecting the best interests of the minor requires multidisciplinary intervention when reasons are identified that require sanctioning the parent's disinterested attitude in taking care of their own child, or more seriously, when direct or indirect violence is generated against him. Administrative bodies work together with judicial bodies in order to assess the need for such a sanction. The present study aims to identify the perception of those working in the two institutions mentioned on the efficiency and results of such procedures.*

**Keywords:** deprivation of parental rights, judicial procedure, professional opinion

### **Introduction**

The present research uses documentary analysis to understand the evolution of the legal framework, with specific reference to the entities involved in this regard, the qualitative method of semi-structured interviews to obtain subjective data and a focus group with specialists involved in such a process.

The proposed general objective aimed at analyzing the views of professionals in the field and their implications on children whose parents have been sanctioned with the loss of parental rights, and the specific objectives established were: identifying the main socio-legal causes that lead to the loss of parental rights; describing the judicial procedure for the loss of rights and the role of the institutions involved, investigating the perceptions of professionals (social workers, lawyers, judges, psychologists) on the effectiveness of the measure, highlighting the psychosocial effects of the sanction on children whose parents have been deprived of their rights.

The target population of the research is made up of specialists directly involved in the procedures for the loss of parental rights. The sample is non-probabilistic, purposive, and the selection was made based on the availability and professional experience of the subjects. It includes twenty social workers from three social assistance departments and fourteen public social assistance services existing at the level of Argeș County, in terms of the applied questionnaire. A focus group was also conducted with five judges from the juvenile and family section of the Pitești Court, five lawyers specializing in family law from Argeș County and five psychologists from Pitești involved in the assessment and counseling of minors.

We will begin this process by going through the documentary analysis determined by the third specific objective. For this, we will analyze the specific applicable legislation.

### **Literature review- analysis of the procedure**

Parental authority represents the totality of those rights and duties that parents must exercise towards their children. At first glance, lexically, the term parental authority may lead us to the idea that the parent only has rights over his or her child, but we are dealing with an obligatory relationship together with the rights of the parties and the obligations assumed by them. (Ploscă, 2020). The notion concerns, on the one hand, the minor's assets, and on the other hand, his or her person. The decisions made by parents regarding their own children must be in accordance with their age and development. In the event that certain disagreements arise between parents regarding decisions regarding minors, the guardianship court will be called upon to decide according to the best interests of the child.

The fact that the parent has the right to take care of the child does not mean that he or she also has the right to order disciplinary measures against him or her, especially those of a physical nature. Certain rights of the child are censurable by parents under certain conditions and up to a given moment - the right to adhere to a religious cult, the right to choose one's religion. (Dobre, 2011).

On the other hand, the obligation of the parents to fulfill their maintenance obligation remains their responsibility until the child reaches the age of eighteen, or if he is continuing his studies until the completion of them, but without exceeding the age of twenty-six.

From a patrimonial perspective, it must be remembered that the assets of the minor and those of his parents are not confused, despite their obligation to administer the child's assets. After reaching the age of fourteen, the minor exercises his patrimonial rights and obligations alone, but only with the consent of the parents or, as the case may be, of the guardianship court.

The exercise of parental authority can be achieved in various ways. As a rule, parents exercise their specific rights and obligations equally and together. When a series of well-founded reasons appear, the sanction of loss of parental rights may be considered. This is subsumed under the idea of endangering the life, health or development of the child and can be identified when we are dealing with: - ill-treatment applied to the minor, - consumption of alcohol or psychotropic substances, - abusive behavior, - serious negligence in fulfilling parental obligations, - serious violation of the best interests of the child. All the details related to the content of the sanction and the way in which the court procedure is carried out in stages are described in art. 508, 509, 512 of the Civil Code.

We can also discuss another hypothesis in which a restriction of the exercise of parental rights occurs when the parent is temporarily objectively unable to fulfill the obligations specific to parental authority, such as poor health, detention or prolonged departure abroad. Unlike forfeiture, in this case we do not base such a measure on the identification of a fault on the part of the parent. At the same time, this solution is reversible (Banciu, 2018). The obligation to delegate the duty to take care of the child's upbringing and education, if the parent goes to work abroad, is often not fulfilled, although the rule is established by art. 104, 105 of law no. 272/2004. Failure to comply with this obligation constitutes a misdemeanor, but unfortunately this way of generating a certain pressure on the parent in question does not actually solve the situations identified in society. (Cătărașu, 2019).

The application of the sanction may be absolute, in the sense that it imposes the prohibition of the exercise of all parental rights, or limited to some of them. It may also extend to all children born at the time of the court decision or may be limited only to certain minors whose parents have been sanctioned. From a temporal point of view, the deprivation of parental rights will have effects until the time when the causes for which it was established have been removed. Here we can talk about the procedure for revoking this sanction. (Chirică, 2017).

Likewise, the depravation of parental rights does not prevent the establishment of personal relationships with the minor, if the principle of the best interests of the minor is not violated. This does not relieve the sanctioned parent of the general obligation to contribute to the costs of raising and educating the minor. If such an interpretation were given to this situation, it would mean creating an advantage for the parent in question, given that he violates legal obligations that had to be fulfilled. The depravation does not always require an illicit, direct action by the parent thus sanctioned against the child, which may lead to the minor being considered a secondary victim, the victimizing trauma occurring mediated over him. (Badea Butoi, et al., 2019). With the limitation of parental rights, it is necessary to establish a substitute for parental authority, this procedure leading to the establishment of guardianship. Given that the loss of parental rights is a sanction by legal nature, the occurrence of its effects does not in any way affect the obligation of the parent concerned to fulfill his legal obligation of maintenance (regardless of whether it is provided in kind or through monetary equivalent). (Mitrache, 2020).

Given Romania's membership of the European Union, we must not forget that there is a community legislation on the social pillar, through which the manner in which the state will ensure, on a substitutive basis, child care is established, when atypical situations arise within the family of the minor in question. (Olteanu, 2021).

Judicial formalism, including in legal matters related to ensuring the best interests of the child, therefore also in the event of the loss of parental rights of one of both parents, will be compensated by the prior provision of social information and counseling, therapy and mediation services for parents, even if they are the cause of such an intervention. (Pătrașcu, 2014). This support has its limits, determined among other things by SPAS (public social assistance services) that are poorly or not at all developed, especially in rural areas, but also by the lack of qualified social assistance personnel, most of the time without specialized studies (Buzducea, 2009).

## **Method**

The semi-structured questionnaire addressed to the social workers included in the study contained both open-ended questions, multiple-choice questions and an evaluation grid.

The relevant items it contained are the following:

- Can you specify what are the most common reasons for the referral for the loss of parental rights?
- Are there sufficient institutional resources to prevent cases of parental risk?
- Is there intervention in the community to eliminate the risk of applying such a sanction? What is the result?
- Is the proportionality of the measure to the factual situation respected? Is the intervention prompt and efficient?



- Can you name alternatives to the sanction of loss of parental rights?
  - Are there administrative and judicial barriers in collaborating with the courts?
    - Is the judicial casework influenced by the way in which psycho-social investigations are prepared?
    - Evaluate on a scale from 1 to 5 the effectiveness of the measure in the protection and development of the child.
    - Post-factum, is there a significant success rate for revoking such a measure?
    - Is there psycho-emotional trauma after applying the sanction only for the child or for the parents as well? What would be the positioning on a scale from 1 to 5?
- The questionnaire has the role of collecting standardized data that can be compared, but also opens space for the free expression of professional opinion.

### **Discussions**

The results of the questionnaire applied to social workers reveal the following percentage, compared to the total number of respondents:

95% of respondents believe that domestic violence and serious negligence are the primary reasons for ordering such a sanction;

80% complain about the lack of real interdisciplinary collaboration and a coherent prevention system;

85% believe that the lack of community involvement becomes an aggravating factor;

90% believe that the measure of deprivation of parental rights is justified only in extreme cases, the appearance of the fact does not always lead to the ordering of a judicious measure;

90% consider the deprivation of parental rights as a last resort, but applied in the absence of real alternatives

55% indicate that the courts are too rigorous and request additions or details in carrying out the psychosocial investigation, in order to make a decision;

95% believe that the foundation of the reason for reaching the analyzed sanction is found in the professional way of drafting the psychosocial investigation;

80% believe that 3 is the score of the effectiveness of the measure of deprivation of parental rights in the indicated scalar interval;

70% believe that the reintegration of the parent is rarely possible without interventions from professionals, necessary support that has a continuity character

100% indicate that the minor whose parent has been deprived of rights is affected to the maximum, the scalar score being in this case 5, and 85% believe that the sanctioned parent is affected at a level 3, in the same scalar interval.

On the other hand, in the aforementioned focus group, which was attended by legal professionals involved in the judicial procedure, as well as psychologists who deal with the management of the problems of minors in such situations, the following main ideas were determined:

The magistrates have seen the need for evidence to highlight that the sanctionable parent generates a major danger to the child. At the same time, they have limits in correlating the sanction with the factual situation determined by the gaps in the psycho-social investigations administered by specialized social assistance services. Last but not least, the limits of legislative solutions do not allow a

correspondence between the situations reflected in practice and the measure of forfeiture. A wider range of solutions would create the premises for much more judicious solutions. Sometimes the sanction appears too harsh, but it is taken because there is no other reserve, other times this can be considered insufficient.

The other legal professionals, the lawyers, have claimed that the procedure is cumbersome, with long deadlines that prejudice the efficiency of the solution. It ends up prolonging the state of risk for the minor unjustifiably. At the same time, the lack of correct information, of popularizing the way in which this institution of sanctioning parental authority works, leads to confusion most of the time. Some of the sanctioned parents do not know that the measure can be reversed and what are the necessary conditions in this regard, when revocation is under discussion.

Psychologists involved in the research have noted the trauma that occurs at the level of the child deprived of interaction with one (or in certain cases with both parents), but have emphasized the importance of such a solution in most such cases. Managing such situations is possible only if adequate counseling is provided, with a continuous nature after the application of the sanction.

The results of free discussions between specialists lead to the idea that most magistrates indicated a strong emotional pressure when deliberating in such cases. Lawyers confirm that the normative acts incident in such situations are clear, but the interpretation of the courts is variable, which determines different solutions and requires future interventions to unify the practice in this matter. Psychology specialists believe that support must be dedicated not only to the main target, the minor, but also to the sanctioned parent. Even the restoration of relations between the two parents must be monitored through post-measure psychological interventions, including in the case of the parents. All of this converges towards the good of the child, on whom the effects of the sanction of loss of parental rights are reflected - the lack of affection from the sanctioned parent and the feeling of abandonment.

### **Conclusions**

The interpretation of the results leads to a series of conclusions, as follows: the deprivation of parental rights is a last attempt to restore the normality of the minor's life. However, the sanction is not applied in a timely manner, the lateness of the application being able to have serious negative effects - violence of various types that could thus be eliminated. The motivation for the admission of such a request is most often postponed by the judicial bodies precisely because of the need to capture the repetitive nature of the non-compliant behavior on the part of the sanctionable parent. The evidence is often difficult to administer, recently the reasons for domestic violence can however be more easily proven thanks to another distinct procedure for them and which has been well adjusted, with tangible effects in practice.

The jurisprudence in this matter is not uniform, which causes dissatisfaction. The interaction between public social assistance services and courts can be improved, especially since not all of these structures, especially those in rural areas, have lawyers to help the social workers who collect data from the field in order to prepare the psychosocial investigation.

The loss of parental rights constitutes a separation of the minor from the sanctioned parent, but without taking the necessary correlative measures of

psychological counseling, it will be devoid of content. The best interest of the child should not be interpreted strictly legally, since in these situations it must be evaluated on an emotional level. We recall here a new element in judicial practice, namely the first final court decision issued at the level of the Bucharest District 1 Court, respectively the Bucharest Tribunal, whereby the reason for parental alienation was translated as psychological abuse and, as a consequence, the sanction of loss of parental rights was applied to the parent who generated such an effect. A proposal for the future is also included regarding the competencies that can be assigned to specialists who will carry out their activity in what is defined as emergency social assistance, especially since the starting point was created by the amendment made in this regard to the framework law no. 292/2011 on the national social work system. A rapid primary intervention within the framework of emergency social assistance will be able to prevent much better the occurrence of cases that today generate the application of the sanction of loss of parental rights.

### Limits

The small number of subjects is a serious limitation, but it is difficult to include all specialists in such a research, especially since those involved in judicial proceedings are more reserved and less available. However, the representativeness of the conclusions is ensured since the number of magistrates, lawyers and psychologists involved in such proceedings is small. Regarding the questionnaire, the included subjects were chosen, using as the main criterion their experience in the profession, which ensures the consistency of the answers given.

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## **The Role of Social Workers in the Recovery and Social Integration of Adolescent Substance Users**

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### **Abstract:**

The tragedy associated with the consumption and administration of psychotropic substances is a pervasive issue in contemporary society, with young people, particularly teenagers, being the most deeply affected by this form of reality distortion. This period of transition from childhood to maturity often leads adolescents to perceive social norms and rules as inadequate for their personal development. This paper examines the role of social workers in cases involving adolescents addicted to psychotropic substances. The objective of the research is to explore the real effects of drug use on adolescent personality development and to highlight the crucial role of the social worker in facilitating the recovery and reintegration of these young individuals into society. The research utilizes the case study method, analyzing two cases of adolescent substance users, aged 17 and 18, from urban environments. To strengthen the scientific analysis, ecomaps and genograms were developed for each adolescent involved in substance use. In conclusion, the involvement of social workers in the recovery and reintegration of adolescents who use drugs must consider the complex nature of adolescence, a stage characterized by multiple changes. During this period, adolescents seek to affirm their individuality, adopting values and behaviors similar to those of adults, which are essential for their integration into peer groups. Understanding these dynamics is key to supporting their successful recovery and social reintegration.

**Keywords:** *adolescent; drugs; recovery; social integration; social worker*

### **1. Introduction**

The analysis of adolescence is a topic of significant interest, extensively studied by specialists in fields such as pedagogy, medicine, psychiatry, sociology, and biology. Often referred to as both "the golden age" and "the ungrateful age," adolescence is described by Golu as "the age of the mirror, the period during which the adolescent seeks to reconcile with themselves" (1994: 159). This phase is marked by vulnerability due to changes in multiple aspects of the personality. While adolescence should not be viewed as inherently inappropriate, critical, or problematic, inadequate or superficial education can serve as a fundamental factor in fostering the development of deviant behaviors.

In specialized literature, drugs are defined as "natural or synthetic substances consumed for their effects on the psyche (psychotropic effects), acting as stimulants or sedatives of mental activity, and modifying sensations and perceptions" (Ardelean, 2001: 4).

From a sociological perspective, adolescents involved in psychotropic substance use can be included within the category of vulnerable groups, as they simultaneously face individual, relational, and structural risk factors that affect both social integration and identity development. Vulnerability is not determined solely by individual behavior but results from the interaction between social inequalities,

deficits in family or institutional support, and exposure to marginalizing social contexts. Sociological literature indicates that such situations require multidimensional interventions oriented toward inclusion and social reintegration, in which social work plays a central role in rebuilding social capital and personal autonomy. In this regard, analyses of the social economy and community support mechanisms highlight the importance of alternative approaches grounded in social solidarity and integrated interventions aimed at reducing risks of exclusion and supporting the reintegration of vulnerable groups (Otovescu, Cioacă & Calotă, 2019).

When we discuss addictive substances, we aim to highlight the role, effects, and classification of substances that cause irreversible and detrimental effects on both the psyche and the physical body. In addition to socio-economic challenges, corruption, human trafficking, and prostitution, drug consumption and trafficking are among the most severe social issues. The increasing number of substance users is a documented reality, contributing to the growth of the black economy (Neagu et al., 2008: 22). These psychotropic substances, which go by various names, can be categorized based on their origin, effects, the degree of dependence they foster, methods of administration, and their overall impact on the human body.

## **25. Literature review**

By definition, an addict is someone who can only live normally with the help of a substance—either a plant or a chemical—that initially produces a feeling of well-being. Over time, the addict becomes dependent on this substance, feeling unable to function without it. The effect diminishes unless the dose is increased, and ultimately, it harms not only the addict but also those around them (Tintiuc, 2007, p. 834). From the perspective of the effects produced, "drug addiction is like a cancer that not only destroys the body of the drug user but, more tragically, undermines their psyche, leading to a profound disorganization of the human personality" (Banciu, Radulescu & Voicu, 1985, p. 58). Gilles Ferreol further explains that "the effects of drug use can be both expected and unwanted. The expected effects include euphoria, mental stimulation, psychological excitement, and, for stimulants, violent reactions; relaxation, drowsiness, and mental calm for sedatives; and altered perceptions caused by hallucinogens. The unwanted effects, however, include addiction, negative impacts on the central nervous system, the heart, and other vital organs" (Ferreol, 2000: 34).

Recent literature highlights the importance of integrating holistic, context-sensitive approaches in social work practice with vulnerable youth. For instance, Obeng et al. (2023) conducted a systematic review on nature-based interventions aimed at promoting sustainable well-being among young people in precarious situations. Their findings suggest that interventions grounded in ecological and experiential engagement—not only reduce psychological distress but also enhance social connectedness and long-term resilience. The global rise in adolescent substance use continues to generate concern among policymakers and practitioners alike, especially as early onset of drug use is increasingly linked to long-term psychological, social, and educational harm. Recent comparative studies underscore the importance of contextually grounded interventions in addressing this issue (Maha et al., 2024).

An important factor to consider is the lack of emotional and affective support from parents towards their children. In some cases, abuse—whether physical or psychological—can play a significant role. Both situations pose a substantial threat to the adolescent's future well-being, often resulting in apathy, mistrust, rebellion, and disobedience to authority. These emotional challenges can increase the likelihood that the adolescent will be drawn to the use of psychoactive substances, a behavior often seen as a response to emotional neglect, social alienation, and deep emotional frustration.

Inequalities, both social and economic, play a significant role in shaping the experiences and challenges faced by adolescents, particularly those who struggle with substance use, as they often find themselves marginalized and vulnerable within society (Dumitru, 2024). Bullying, whether in school or online, further exacerbates the challenges faced by adolescents, often contributing to emotional distress and leading some to seek refuge in harmful behaviors, such as substance use, as a means of coping with their experiences (Dumitru & Ciucă, 2019).

## **26. Methodology**

The aim of this research is to examine the real effects that drug use has on the development of adolescent personalities, to explore the negative consequences and challenges faced by adolescent substance users, and to emphasize the importance of social worker involvement in the recovery and reintegration process of these adolescents into society.

To achieve these objectives, the case study method was employed. The research focused on a target group consisting of adolescent substance users who voluntarily agreed to share information regarding their personal situations. All participants were informed about the purpose of the research and assured of the confidentiality of their personal identification data. The subjects of this study are two adolescents, both 17 and 18 years old, residing in urban areas.

The selection of the two adolescents was based on several criteria: (1) confirmed history of substance use as documented by social services or medical reports; (2) residence in urban areas where structured intervention programs were accessible and where institutional collaboration (schools, NGOs, psychologists) was feasible; (3) voluntary participation and informed consent from both the adolescent and a parent or legal guardian; and (4) willingness to participate in follow-up sessions over the course of one year.

Adolescents from rural or socioeconomically marginalized communities were not included due to the difficulty of ensuring consistent engagement, lack of institutional records, and limitations in local infrastructure for psychological and social work services (Duvnjak et al., 2022). The current study, therefore, provides in-depth, qualitative exploration rather than a representative sample, with the aim of generating insights into intervention dynamics rather than broad generalizations. Data collection was carried out through three separate meetings with each of the subjects, held at the Public Social Work Service in their respective places of residence. Each meeting lasted approximately 40 minutes, allowing enough time for in-depth discussions. During these meetings, all relevant information was carefully documented to ensure no significant data was overlooked, given the sensitive nature

of the topic being addressed. The data was recorded in real-time to preserve its accuracy.

To strengthen the scientific validity of the study, an ecomap and genogram were created for each adolescent involved in substance use. These visual tools provided a comprehensive representation of the adolescents' social environments, familial relationships, and broader support networks. They were invaluable in gaining deeper insights into the context in which the adolescents live and the factors influencing their behavior.

Although not explicitly framed in theoretical terms, the analysis in this study aligns with Bronfenbrenner's ecological systems theory, as it considers the interplay between individual behavior, family dynamics, school environments, and broader institutional responses. Building on this, we propose a practice-informed concept of relational resilience through guided social support—a dynamic triadic framework in which adolescents, families, and professionals co-construct a recovery trajectory. This emergent perspective may contribute to future theoretical refinement by integrating individualized recovery with intersubjective and institutional support systems.

By using the case study method and employing tools such as the ecomap and genogram, this research aims to provide a nuanced understanding of the impact of substance use on adolescents and the vital role that social workers play in supporting their recovery and reintegration into society.

## **27. Presentation of the Case Study**

In this section, we present a detailed case study that offers a closer look at the individual experiences of an adolescent struggling with substance use. Through this case, we aim to illustrate the unique challenges faced by adolescents, the influence of family dynamics, and the role of professional support in their recovery process. The case study highlights key factors that contribute to substance use, the consequences it has on the adolescent's well-being, and the steps taken toward reintegration into society. By examining this case, we hope to provide valuable insights into the broader context of adolescent substance abuse and the importance of early intervention and support.

*Case Study 1.* Teenager A. F. is currently 17 years old, born on 04/08/2006, in the city of S., county S. She is enrolled in high school and is in the 10th grade. Behavioral issues linked to substance use were first observed on 25/05/2021, prior to which the teenager had been confirmed to be clinically healthy. The teenager's immediate family includes her mother, C.F., who is 54 years old, and her 30-year-old brother, M.F., who lives with his mother and sister. Her mother works as a nurse at a private health facility in their hometown, while her brother works as a school teacher at a local secondary school. Financially, the family is stable, with a steady income that allows them to maintain a modest standard of living relative to the local economy. Tragically, the teenager's father passed away in a road accident when she was 10 years old. In addition to her immediate family, the teenager's extended family includes a 40-year-old maternal aunt who lives alone in city B.

This case study provides valuable insights into the adolescent's background, family dynamics, and the onset of substance-related behavioral issues, which will be further examined in the results section. The family resides in a privately owned home, inherited by the mother from her own mother, and the household is equipped with all

necessary utilities, with the mother overseeing its upkeep. The maternal grandparents passed away six years ago, and the paternal grandparents died four years ago. Family relations have been tumultuous, marked by frequent quarrels that contributed to heightened stress, nervousness, and anxiety, particularly as a result of the teenager's behavior related to substance use. Following the death of the father, the mother chose not to pursue a new relationship, focusing instead on maintaining the family's well-being. Despite her sacrifices, the teenager feels unappreciated, often criticizing her mother for being overly strict and restricting her freedom. This perceived lack of autonomy has caused the adolescent to feel inferior to her peers, contributing to her sense of isolation within her social group.

*Social history.* From a social perspective, family relationships were generally positive, with good interactions with neighbors, family friends, and close relatives, as well as with local institutions in the city. The family is regarded by the community as cooperative within their means. Socially, the teenager actively participated in events organized by local authorities and had exemplary behavior within her educational institution up until the point she began using addictive substances. Her academic performance, both during study hours and extracurricular activities, was outstanding until 2021, with teachers praising her notable achievements. She completed her first year of studies with remarkable results (9.35), earning admiration from her teachers. Outgoing, dynamic, and emotionally expressive, the teenager had the ability to form close connections and earn the affection of those around her.

As substance use began, the teenager's behavior started to change, even towards her teachers. She began skipping school and was seen by her teachers visiting a 27-year-old man. Along with these signs of disengagement from school and the teaching staff, her classmates observed drastic mood swings, with episodes of euphoria and excessive cheerfulness followed by sudden, unexplained aggression. Recognizing these early warning signs, the school's social worker took immediate action. The case was reported to the teenager's mother and older brother, who agreed to notify the relevant public authorities and the General Directorate of Social Assistance and Child Protection. This marked the beginning of an intervention plan designed to address the minor's needs.

*Specialized intervention.* The specialized intervention began following the notification of the teenager's antisocial and aggressive behaviors, which primarily occurred during school hours. The first step in the intervention process was to inform the mother, who was shocked to learn that her daughter had been leaving the house each morning, claiming she was going to school. Despite maintaining a fairly close relationship with the school, the mother had not intervened earlier because she trusted her daughter. The emotional impact on both the mother and the teenager's brother prompted them to agree to collaborate with the team of specialists to begin the recovery process on 27/10/2021.

The school's social worker, along with a private psychologist, conducted an interview with the teenager, A., to discuss the risks and negative consequences she was facing. During the interview, A. admitted to using various amounts of ethnobotanical drugs, which an acquaintance had provided her, and she had been consuming them with a friend. Although she agreed to accept help from the specialists, A. insisted that she would not reveal the identity of the person who had supplied her with the substances.



The teenager explained her decision to use ethnobotanical substances by stating, *"I often felt alone and isolated because my mother was no longer always there for me, and my brother was preoccupied with his own life. So, I decided to try something new. After a while, I met V., with whom I could talk about my feelings. I can say it was a friendship, and the goal was to feel noticed and understood. Taking these substances allowed me to express myself in a vulgar and violent way without caring what others thought. Eventually, it seemed like no one cared about me."*

With the help of the social worker, the teenager was able to restore her relationship with the school. She was reintegrated, in part because she was under continuous monitoring during school hours. The teaching staff maintained strict confidentiality regarding her behavior, ensuring that her classmates neither discriminated nor criticized her.

In this case, the social worker, in collaboration with relevant state authorities and child protection services, played a key role in facilitating the implementation of a comprehensive medical recovery plan. This plan included a one-month hospitalization for detoxification, followed by ongoing medication treatment at home under the supervision of the family.

The support from the family, particularly the emotional backing provided by the mother, was crucial for the teenager's recovery. To ensure her daughter received the necessary care, the mother made the decision to stop working overtime. However, the teenager's brother struggled to accept the situation, blaming his mother for her perceived lack of emotional involvement in his sister's upbringing and education, as well as the challenges that led to her substance use. This tension led to strained relationships within the family.

To address these issues, the social worker, in partnership with the psychologist, recommended six sessions of specialized family therapy. The goal was to help the family manage the stress caused by the situation, improve communication, and rebuild trust. Along with drug therapy and occupational therapy, these interventions were designed to support the teenager's successful social reintegration.

*Case study 2.* I. B. is currently 18 years old, having been born on 15/02/2005 in the city of B., county B. He is not currently enrolled in any form of education and completed his studies up to grade VIII in his hometown. After that, he engaged in various activities to earn money independently. His family consists of his 45-year-old mother, N.B., who does not work and is struggling with alcohol addiction, and his 14-year-old sister, L.B. L.B. is supported by their maternal grandparents, who are 62 and 65 years old, respectively, with the grandfather being a pensioner. L.B. is currently attending secondary school and maintains a good relationship with her mother despite the latter's alcohol addiction. The involvement of the maternal grandparents in raising and educating L.B. has been instrumental in her development, particularly after I.B. ran away from home. I.B. and L.B. are half-siblings, each born from different extramarital relationships their mother had. They have never met any of their paternal relatives, nor did they have any connection with their biological fathers. At present, their mother is not in any marital relationship and is under the care of specialist doctors for her alcohol addiction.

*Social history.* The teenager I.B. was discovered through a non-governmental organization on the outskirts of the capital. He had been living on the streets for a year, scavenging food from dumpsters. According to his account, he ran away from

home because he felt compelled to work in order to support his sister, as their mother was addicted to alcohol. During this time, the maternal grandparents, who were estranged from their daughter, did provide the children with food and clothing, but little else.

Feeling rejected by his mother and ostracized by the community, I.B. decided to leave home and earn money for both himself and his sister. After several months of living on the streets, he managed to evade capture by the police five times. Realizing the dangers he faced, he reluctantly joined a group of young people who exploited him to distribute drugs to others. In exchange, the leader of the group gave him money and drugs as rewards. I.B. began consuming various substances, ranging from opium to LSD. He claimed that taking the drugs allowed him to forget his problems, providing temporary relief. This cycle continued for nearly a year, during which I.B. became both physically and mentally addicted to drugs.

The teenager revealed that when he had nothing to eat or nowhere to sleep, he was forced to return to the "work" he was doing, as it was the only means of survival within the harsh street hierarchy. His life spiraled further until 14/05/2022, when members of the non-governmental organization approached him while he was administering his drug dose. At that point, the process of specialized intervention began. I.B. acknowledged the severity of his situation and accepted help, realizing that he could not break free from his addiction on his own. This marked the beginning of his journey towards recovery.

*Specialized intervention.* The specialized intervention was carried out by a social worker from the non-governmental organization, who promptly informed and reported the case to both local and regional authorities. After agreeing to the intervention, the teenager was admitted to a psychiatric hospital, where he underwent detoxification and participated in an adolescent-specific rehabilitation program. His hospitalization lasted for six months, after which the non-governmental organization took over his care, providing support for professional training courses and securing temporary housing for him for one year.

In addition to the educational and vocational support, the teenager has continued to receive psychological therapy and occupational therapy. These therapeutic services are aimed at helping him develop coping strategies and behaviors that will enable him to navigate life's challenges more effectively.

Family ties have been restored with his maternal grandparents, his sister, and his mother. Although relationships are currently functional, emotional and affective support from the family remains limited. From the teenager's perspective, it is clear that he never envisioned his life taking such a path, but he is optimistic about the future. He believes that, having gone through this transformative experience, he will be in a better position to help others who are living on the streets, offering guidance to those who find themselves in situations similar to his own.

## **28. Results and Discussions**

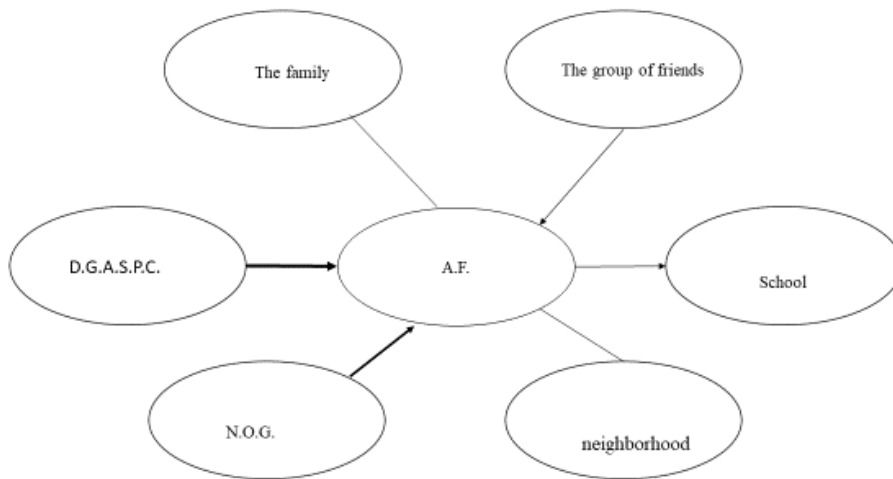
The results of this study offer valuable insights into the complex relationship between adolescent substance use, family dynamics, and the wider social environment. Through the case studies, we were able to identify significant patterns in the adolescents' backgrounds that may have influenced their substance use, as well as the crucial role of the family environment in either supporting or hindering their

recovery. The findings reveal that the effects of substance use on an adolescent's behavior and overall well-being are multifaceted, with both individual and environmental factors playing vital roles. Furthermore, the involvement of a social worker in guiding the recovery process has proven to be essential in helping these adolescents overcome the challenges they face and work towards reintegration into society.

In comparative context, the Romanian intervention model employed in these case studies aligns most closely with abstinence-based approaches emphasizing psychosocial recovery, educational reintegration, and structured family therapy. In contrast, international harm reduction models (e.g., Canada, Portugal) focus on minimizing risks associated with ongoing substance use—such as through safe injection sites, substitution therapies, or supervised housing—while avoiding mandatory abstinence. Although Romania has limited harm reduction infrastructure for adolescents, these international practices highlight alternative strategies that prioritize health stabilization and reduce stigma. This contrast underscores the need for context-sensitive integration of global best practices with culturally appropriate interventions.

The role of the social worker was to monitor the situation, to get involved in providing specialized intervention in collaboration with other specialized institutions, by making quarterly reports related to the case, by consulting and following the individual daily monitoring sheets after the psychological therapy, by following school attendance and the results obtained by the teenager following her reintegration into the study program.

Also, the weekly visits that the social worker made to the teenager's home, the support, the collaboration with the family and the acceptance of the solutions established together with the minor led to the resolution of the case within a period of one year from its referral. The social worker was the specialist who influenced the adolescent to access the dedicated programs, the one who followed the reintegration of the student into the school group previously attended by preserving confidentiality, the one who took into account the recovery of the support of the adolescent's family and the development of intra-family relationships so that all members can overcome the situation of crisis (see Figure 1 and Figure 2).



**Note:** Specific symbolic language used in the application of the ecomap technique:

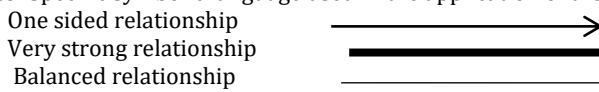
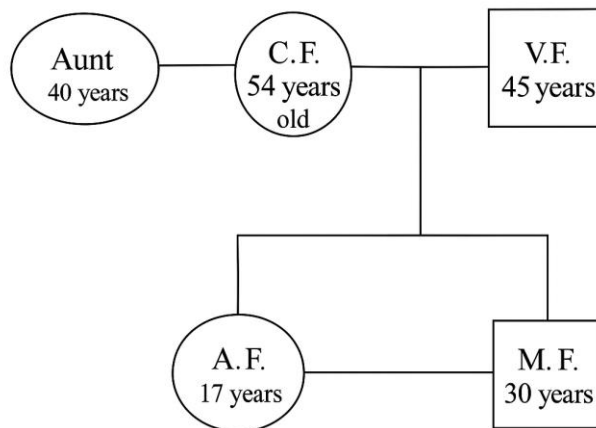


**Figure 1.** Ecomapa Case study 1



Adolescent A.F. before consumption she showed cooperative behaviors, being sociable both at school and at home. During consumption, she became aggressive, vulgar, indifferent to those around her. After the implementation of the intervention, the behavior was redirected, thus the adolescent became cooperative. Family relationships are balanced thanks to the intervention provided by family therapy.

**Note:** Specific symbolic language used in the application of the genogram technique:

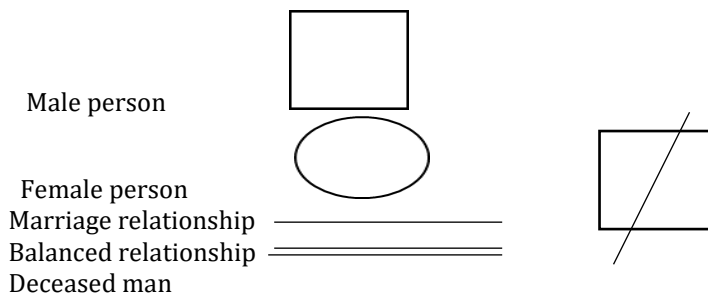
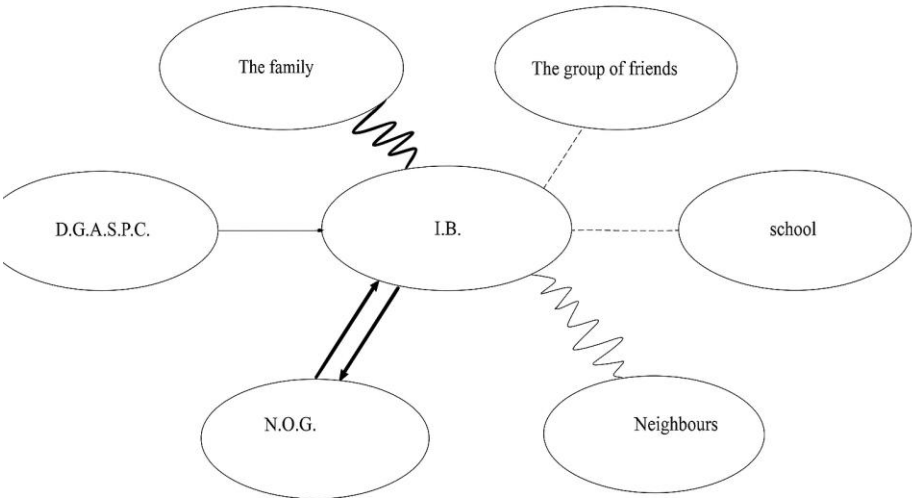


**Figure 2.** Genogram Case study 1

The role of the social worker was to notify the case, monitor its progress, and ensure the application of the individualized intervention plan. The situation is currently being monitored in collaboration with the specialized staff responsible for the recovery and social reintegration of adolescent I.B. After turning 18, I.B. secured a job at a private bakery, where he is now financially independent and lives alone in an apartment near the NGO. Ongoing monitoring is maintained through weekly visits from the social worker, psychologist, and therapist. They continue to compile documentation and produce monitoring reports based on the daily monitoring sheets from the psychological and occupational therapy services that I.B. receives.

The outcomes in this case have been remarkable, as I.B.'s determination for recovery and reintegration into society has been incredibly strong, fueled by his desire to help his sister. Furthermore, I.B. aspires to become a specialist in order to assist others facing similar challenges. His personal growth and commitment to making a positive difference in the lives of others reflect his remarkable journey toward rehabilitation. (see Figure 3 and Figure 4).



**Note:** Specific symbolic language used in the application of the ecomap technique:

- Stressful relationship -----
- Very strong relationship =====
- Strained relationship ~~~~~
- Balanced relationship \_\_\_\_\_
- One sided relationship ----->

**Figure 3.** Ecomapa Case study 2

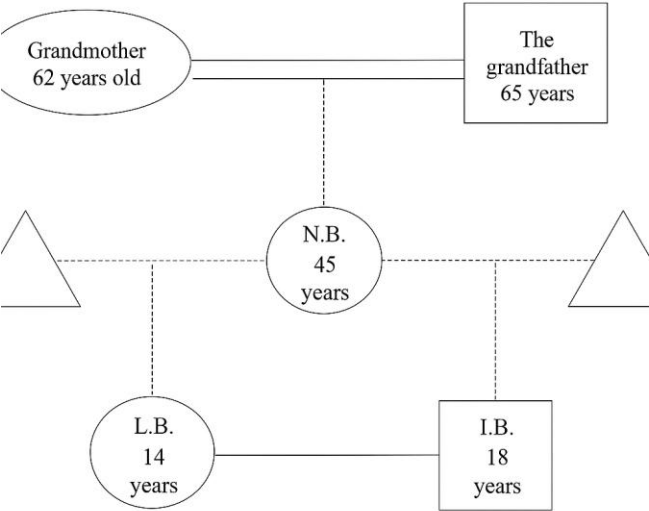
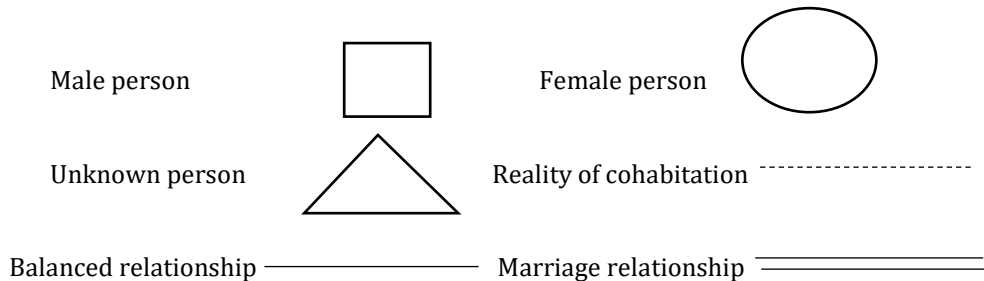


**Figure 4.** Genogram Case study 2

The teenager I.B. before consumption he exhibited antisocial behaviors, being raised in a family where he did not have the support of his mother, and his father never knew him for who he was. Relationships with sisters and grandparents are balanced. After consumption, the teenager displayed aggressive behaviors, had no friends, and did not attend any school. After the intervention, he becomes sociable, decides to collaborate in order to help his younger sister.

**Note:** Specific symbolic language used in the application of the genogram technique:



In the first case study, the teenager did not exhibit severe behavioral issues nor was she involved in any antisocial groups. However, driven by a desire for attention and the need to stand out, she began associating with certain individuals who introduced her to the use of psychoactive substances. Through the analysis of the genogram and ecomap, it became clear that her problematic behaviors emerged only after she began using these substances, significantly impacting her relationships with school, teachers, friends, and classmates.

In the second case, the presence of antisocial and problematic behaviors was largely a result of the adolescent's challenging family situation. I.B. quickly adopted these behaviors, which eventually led him to leave home. During his period of homelessness, he turned to the use of psychoactive substances, which were given to him as compensation for performing various "services" for different groups. The genogram and ecomap revealed a strained family dynamic, which served as a key factor in his disruptive behavior. This family conflict explains why I.B. repeatedly ran away from law enforcement, preferring to live on the streets and in trash heaps, far from his home.

In the first case, it was observed that the teenager stopped using psychoactive substances and ceased associating with harmful individuals only after the intervention of the social worker from the educational unit, in collaboration with other specialized institutions. The recovery and reintegration of the adolescent within the educational system were achieved through the social worker's involvement. Additionally, the social worker facilitated the provision of support services, including psychological counseling, occupational therapy, and family counseling, to aid in the adolescent's recovery.

In the second case, I.B. only truly accepted his recovery and reintegration—physically, mentally, and socially—under the guidance of the social worker at the non-governmental organization. He became cooperative when he recognized the severity of his situation and understood that he could not resolve it alone. This highlights the essential role of the social worker in the adolescent's recovery process

and the positive outcomes that followed the cessation of substance use. In both cases, it became evident that the social worker played a pivotal role in the adolescents' recovery.

Key concepts such as "treatment," "recovery," and "rehabilitation" were central to the social worker's approach in both situations. According to phases Yaya Castañeda et al. (2025), social skills are crucial for rehabilitation, stronger skill-change correlation in adolescents.

The social worker's ability to instill a sense of hope, inspire change, and offer the necessary support for a fresh start underscores the importance of their role. These achievements were made possible through collaboration between the social worker and relevant institutions in the fields of social and child protection. Monitoring such situations requires considerable resources, and the specialist's skills must align with the real needs of those in crisis. Repeated visits, mediation of relational conflicts, and coordination with other institutions and specialists for the adolescents' recovery and rehabilitation are just a few aspects of the social worker's involvement in these complex cases.

The findings of this study align closely with the biopsychosocial model (Engel, 1977), which conceptualizes substance use and recovery as the outcome of intertwined biological vulnerabilities, psychological stressors, and social/environmental factors. For instance, the traumatic loss of a parent (Case A) or prolonged neglect and homelessness (Case B) triggered coping behaviors rooted in both psychological distress and environmental deprivation. The social work interventions targeted not only behavioral change but also environmental stabilization, consistent with this integrative model.

Moreover, the analysis reflects principles from structural social work theory (Moreau, Mullaly), particularly in the second case, where systemic poverty, maternal addiction, and institutional neglect created a cycle of exclusion. The social worker's role extended beyond individual rehabilitation to include structural advocacy—securing access to housing, vocational training, and mental health services—thereby addressing root causes of marginalization, not just symptoms. This perspective reinforces the necessity of policy-aware practice in cases of adolescent substance use.

## 29. Conclusions

In conclusion, the effects of drug use are among the most severe, with the addict often struggling to adapt socially and failing to meet basic needs such as food, clothing, and housing. Additionally, they often lack the ability to fulfill their emotional needs, such as forming relationships or maintaining a family. This results in a profound sense of unfulfillment and a failure to achieve a stable social identity, as the addict is unable to sustain a fixed position in the workforce or participate in remunerative activities. These issues are compounded by the long-term, often irreversible, psychological, cognitive, and physical damage caused by substance use. As such, the adolescent addicted to substances is often seen as a victim, caught in conflict with themselves, their family, and society at large.

The social worker plays a critical role in specialized intervention, guided by methodologies approved at the national level by the National Anti-Drug Agency and the Government of Romania. The primary goal of this intervention is to fulfill the objectives outlined in the National Anti-Drug Strategy. Specialized support is



provided to adolescents identified as substance users, with intervention tailored to the severity of each individual case. Access to these services is granted after the case is reported and the adolescent's parent or legal representative is informed.

The process of specialized intervention is defined by the application of case management principles, addressing the crisis situation at hand. The social worker, in collaboration with a multidisciplinary team, focuses on implementing an individualized intervention plan. This plan includes school reintegration to continue education, psychological counseling to foster the adolescent's internal motivation, and social reintegration following detoxification and medicinal therapy. Through this comprehensive approach, the social worker helps guide the adolescent towards recovery and reintegration into society.

The existence of an open, honest relationship between adolescents and their parents or caregivers, coupled with a non-taboo approach to discussing drugs, fosters effective communication. This dynamic can significantly influence the adolescent's personal development and help them navigate their environment more realistically. By engaging in open dialogue, adolescents can learn to recognize and evaluate the risks associated with drug use and other harmful substances. Incorporating cognitive therapies into the recovery process can significantly improve behavioral outcomes, as they help adolescents recognize and challenge negative thought patterns, ultimately reducing inappropriate behaviors and supporting long-term positive change (Dumitru Tăbăcaru, 2024).

Unfortunately, the reality is that drugs will always be a part of society, particularly given the underlying economy that often revolves around these substances. However, the recovery and reintegration of substance users—especially teenagers—must remain a top priority. Adolescents represent the most vulnerable group, and the consequences of neglecting their recovery can result in long-term societal costs. Thus, addressing the needs of young drug users should be seen as an urgent and invaluable investment in society's future, one that prevents the high price of lost potential and ensures that these individuals have the chance to rebuild their lives.

### **30. Limitations**

While the findings offer valuable insights into the role of social workers in adolescent substance use recovery, several limitations should be acknowledged. First, the study includes only two case studies, which limits the generalizability of the results. The insights presented may not reflect the experiences of adolescents from different socioeconomic contexts, including rural or marginalized communities. Secondly, data collection relied heavily on self-reported information from adolescents and their families, which may be influenced by memory bias, social desirability, or underreporting—particularly concerning sensitive issues such as substance use and family conflict. Another limitation is the short-term perspective. The one-year monitoring period restricts the study's ability to assess long-term recovery outcomes, including relapse rates and sustained social integration. Moreover, the absence of a control or comparison group limits the capacity to attribute observed improvements solely to the involvement of the social worker, as other concurrent interventions may have contributed to the outcomes. Both adolescents in the study are from urban environments. The lack of representation from rural populations, ethnic minorities (e.g., Roma communities), or youth with disabilities restricts the study's

inclusiveness. Lastly, each case was based on three interviews lasting approximately 40 minutes. More frequent or prolonged interactions might have yielded deeper insights into the adolescents' psychosocial dynamics and recovery trajectories.

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**Book Review:**  
**Contemporary Sociology: Fields of Study and Representative Concepts. Edited by Dumitru Otovescu and Cristina Otovescu.**  
**Craiova: Editura Beladi, 2025. 2 vols., 1200 pages.**

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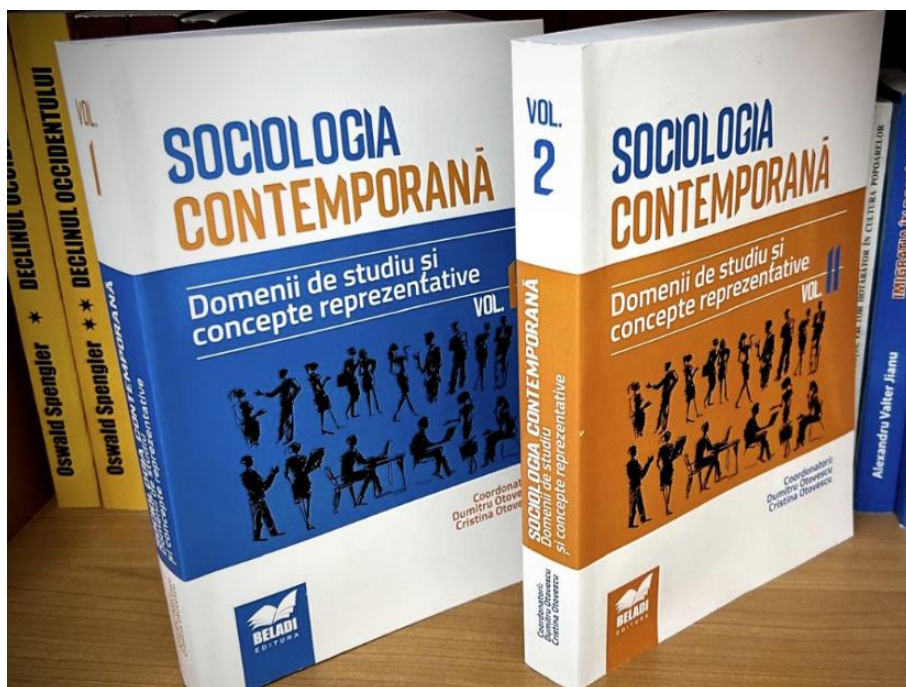
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Under the coordination of a Craiova-based academic tandem, Dumitru Otovescu and Cristina Otovescu, a substantial diptych has recently been published in the *Contemporary Sociology* series (Otovescu & Otovescu, 2025). Its stated aim is to offer a “systematic” radiography of contemporary society by defining its fields of study and providing readers with a representative conceptual toolkit. An examination of the synoptic thematic framework reveals three major problematic sections: the first two address national society—namely, basic social units and the principal social phenomena, activities, or processes—while the third focuses on a broad spectrum of contemporary phenomena of regional or continental scope, ultimately engaging with the very destiny of the human condition within the turbulent landscape of contemporaneity. Through the contributions of 27 authors—Romanian and international—comprising university faculty and prestigious scientific researchers, and by employing an orientative thematic framework that ensures structural unity, the volumes also seek to “configure a micro-dictionary of domain-specific terms” for each field addressed, an undertaking of unquestionable utility.

It is self-evident that the publication of these two volumes, equipped with a luxuriant bibliography, fulfills sociology’s enduring mission: to study contemporary society, explain its structure and dynamics, and—often with corrective intent—focus on its dysfunctions. This is not to suggest, however, that sociology is a miraculous science, as it was sometimes believed to be in Romania during the years of the discipline’s institutional revival.

It is worth recalling the enthusiastic years of sociology’s institutional rebirth, when the first cohort began its studies in 1966 with the establishment of the Sociology Section within the Faculty of Philosophy at the University of Bucharest. This was a pioneering mission with wide social resonance—perhaps too hasty, perhaps even “reckless,” as Professor Rostas once remarked—coinciding with the years of national renewal (de-Sovietization and the cultivation of a national ethos) that legitimated the new political leadership through the appointment of the young Nicolae Ceaușescu at the head of the Romanian Communist Party in March 1965. Once denounced as an “imperialist science,” sociology was rehabilitated (alongside cybernetics and genetics), and the merits of Miron Constantinescu—himself a high-ranking political figure who was later rehabilitated—are undeniable, even if some voices, rejecting the “mythology of rehabilitation,” have contested his role. What must not be forgotten is that sociology was reinstated by a political decision. Miron Constantinescu was an intellectual, an authentic (Marxist) sociologist, and a devoted activist. Feared, proud, and vain, with a tragic destiny, Constantinescu (1917–1974) was punished for “factionalism” in 1957 and for other iconoclastic gestures during

the Khrushchev era. His death in 1974, while serving as Minister of Education, foreshadowed the difficult years that followed—even though sociology could no longer be abolished, as it had been in 1948. Its sinuous path, its “non-linear development,” the reflexes of obedience to the ideological imperatives of the moment (especially after the 1971 Theses), but also the “Romanian tactic of circumventing official directives,” as Professor I. Drăgan observed, ensured its survival even after the fateful year of 1977. Yet one difficult question, at the level of state and party authorities, could no longer be avoided—one famously recalled by Professor H.H. Stahl: what use are sociologists?



Clearly, this question should have been asked much earlier, before dozens of graduates of the revived generation were dispersed throughout the country, euphorically proclaiming the need for sociology. Their professional integration, beyond the discipline’s symbolic “aura,” proved—in most cases—highly problematic, as the relevant authorities were neither sensitized to nor familiar with the profession, with the exception of the academic environment. Sociology was, in essence, a “fluid” profession, ill-defined, at best tolerated, and not included in the official occupational nomenclature. Neither responsible sociological practice nor scientific support—situated in a blend of Gustian and Marxist traditions—could mitigate these dysfunctions in the professional lives of sociologists. Paradoxically, this occurred within a discipline that, as the “science of society,” of social realities and facts, had precisely the mission of correcting societal dysfunctions. To this we must add a lack of professional solidarity: sociologists were far from forming a cohesive professional group, visible within the socio-cultural field. Ideally, as Professor I. Drăgan noted, their role might have resembled that of writers, acting as a “diffuse symbolic counter-

power” (Mitulescu, 2021: 286). Instead, through disqualification, re-professionalization, and reconversion, many former graduates abandoned the discipline; only those employed in research enjoyed a relatively better fate. Even then, their studies—when conducted—often proved inconvenient due to their “critical charge” and thus unwelcome to the administrative bureaucracy. Equally difficult to explain remains their lack of involvement in the historic upheaval of December 1989—a turning point that nonetheless led to the revival of sociology as a profession, finally recognized and liberalized (Otovescu & Otovescu, 2025).

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Beyond a shared set of principles—widely accepted and ensuring the institutionalization and standardization of the discipline—the existence of divergences, heterogeneous traditions, and specific, thematized problems makes the establishment of a common paradigm unlikely. First of all, because sociology, as it presents itself today, remains in a pre-paradigmatic phase, as C. Zamfir once reminded us. Furthermore, one should not forget that its applied character and social utility inevitably lead to localized solutions, shaped by contexts that do not lend themselves to euphoric, globalizing treatments. Nor can we hope that sociological interpretations have fully emancipated themselves from ideological passions or pressures.

Since sociology does not aspire to be an ethical doctrine, but rather seeks to understand what *is*; since sociological ideas themselves become social products and must therefore be assessed from a dual perspective—scientific relevance and social relevance alike; and since the desire to reform society encourages thematic proliferation—along both descriptive-explanatory lines and those of social innovation—the plurality of complementary approaches becomes understandable. These approaches are, inevitably, anchored in specific societies; they do not offer universally valid solutions delivered by an omnipotent, magician-like sociologist. As explanatory strategies, the structures of sociological thinking tend to coalesce in a systemic yet competitive manner, without the capacity to propose a single paradigm and, regrettably, often without communicating with one another.

Moreover, although the sociologist should be a “natural ally,” capable of offering qualified, broadly applicable advice useful to decision-makers, the profession appears to have resigned itself. The social itself has “disappeared as an object of social construction” during the turbulent years of post-communist transition (Zamfir, 2009: 144). Yet the discipline—with its trail of dissatisfactions, illusions, and projects, oscillating between enthusiasm and disappointment—remains part of collective consciousness, constituting a scientified expression of society, despite the prevailing “lack of interest” and, implicitly, a “lack of expertise.”

In any case, sociology aspires to move from the accumulation of information (through sociographic studies) toward genuine understanding, seeking an integrative, reflexive perspective capable of producing “adequate definitions of reality.” This interrogative reading—often in tension with common sense (that tacit knowledge or implicit sociology)—belongs to a “disciplined eye,” broadening the horizon of understanding and aspiring to function as a project of rationalization, nurtured by a “clarifying” discipline (Bauman, 2008: 235), one that is inevitably on

the offensive within the conditions of a media-saturated society (itself a new sociological concept).

Unfortunately, so-called sociological studies often lapse into mere sociography, ignoring macro-level themes, lacking the capacity to formulate valid propositions, and failing to attain the much-desired dual relevance: epistemological and social. Sociology, as a “social operator,” as an applied social science—simultaneously discipline, institution, and profession—reveals a largely untapped potential for expertise. It is paradoxical that in an era of societal reform, sociology itself—“liberated” after the December 1989 upheaval and awakening immense hopes—has been slow to make a major contribution to social construction. Admittedly, it is rarely solicited, even though the problems confronting society would seem to demand sociology’s assistance. Revitalized and reconnected both to focused empirical studies and to major societal issues, the discipline has every chance of becoming a “credible science,” adjusting in real time to the new frames of reference imposed by globalization, in which we are inevitably involved.

Paradoxically, after the 1990s, in other regions we have witnessed a decline of the discipline. James T. English, sounding the alarm, observed that cultural studies, gender studies, postcolonial studies, and similar fields have taken over and assimilated the sociological perspective, leaving sociology itself to play the modest role of a “partner.”

Those who have examined the social history of Romanian sociology have highlighted its close dependence on shifting social contexts, themselves subject to the dirigiste “political meteorology.” Long ignored, relegated to “illegality,” diverted apologetically, or nourished by illusions, sociology follows the logic of the broader societal context, such that sociological production is inevitably “deeply contextual.” Inevitably anchored in Romanian realities, even when decontextualizing attempts are made, these efforts often leave the impression of an “empty universalism,” as has been observed. The issue remains controversial. Amid rapid global changes that alter national specificity and erode sovereignty, and with the emergence of transnational sociologies, some sociologists believe that the denationalization of sociology will occur “with certainty” (Vlăsceanu, 2011: 60). Other voices—most notably Ilie Bădescu—argue firmly that sociology “will either be national, or it will not exist at all.”

Ultimately, the equation—destined to be cyclically revisited—concerns the relationship between power (decision-making bodies) and reality (unvarnished). Sociology, navigating the meanders of “Romanian communism,” between glaciations and semi-liberalizations, caught in the trap of reformist caprice and encomiastic reverence, endured the supremacy and hypocrisy of ideology. Today, lacking a macro-level project and subject to self-colonization, it faces—through insidious political correctness—the assault of re-ideologization. What are sociologists doing, we ask ourselves? They should, as Alain Touraine once warned, “get up early.”

It is therefore thanks to the sustained efforts of Professor Dumitru Otovescu—ever-enthusiastic and indefatigable—through whom the Faculty of Sociology emerged in Craiova, and with the support of his collaborators, that we may note with genuine satisfaction the appearance of a work that is impossible to ignore for those wishing to deepen the thematic and problematic field of sociology (Otovescu & Otovescu, 2025).

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### Book Review:

***Economy and Society: Foundations of Interpretive Sociology*, by Max Weber. Translated by Vlad Ovidiu Cioacă; Introductory Study by Prof. Cătălin Bordeianu; Preface by Prof. Dumitru Otovescu. Craiova: Beladi Publishing House, 2025-. 3 vols., 1597 pages.**

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The publication in Romanian of *Economy and Society. Foundations of Interpretive Sociology* by Max Weber, issued by Beladi Publishing House (Craiova, 2025), represents a major editorial and scholarly event for Romanian sociology. In a contemporary academic environment increasingly shaped by bibliometric pressures and by the near-exclusive valorization of articles indexed in international databases, the initiative to translate and publish a canonical work of classical sociology may appear, at first glance, marginal or even anachronistic. In reality, it restores one of the university's essential missions: ensuring critical and systematic access to the major theoretical constructions that underpin the social sciences.

The reduction of scholarly output to the performative logic of high-impact-factor articles has generated, over recent decades, a series of epistemic imbalances: excessive fragmentation of knowledge, the marginalization of comprehensive theoretical syntheses, and a gradual weakening of dialogue with the classical tradition. Within this context, the translation of Weber's foundational work is not merely a cultural gesture, but also a methodological and pedagogical one, reminding us that sociology, as a reflexive discipline, is constituted through constant engagement with its own foundations.

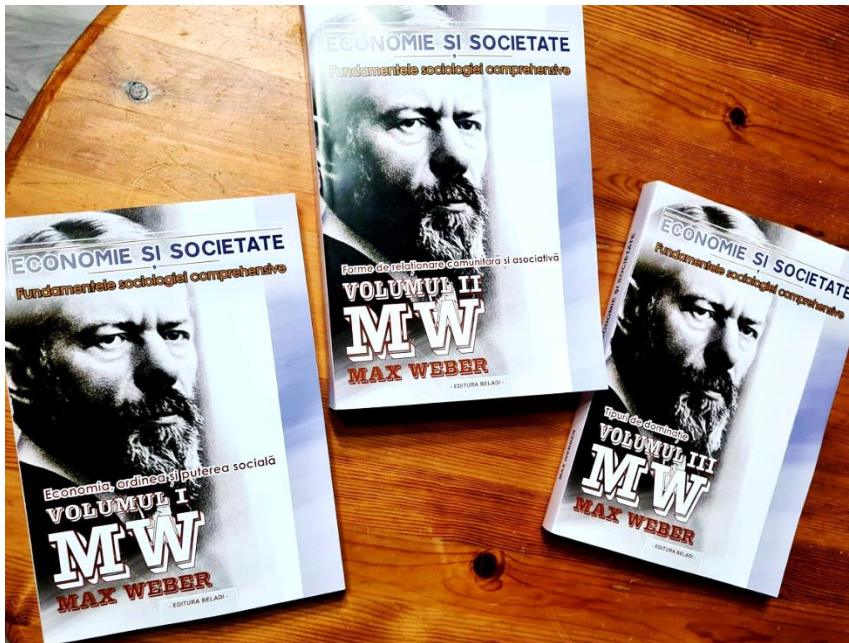
The enduring relevance of Weber lies precisely in the analytical robustness of his core concepts—social action, rationality, domination, legitimacy, ethics—which continue to provide indispensable tools for understanding late modernity. As this edition clearly demonstrates, the classics of sociology do not belong solely to the past; on the contrary, they continue to structure interpretations of the present, provided they are read with conceptual rigor and contextual awareness.

Special mention must be made of the coordinator of this editorial project, Professor Dumitru Otovescu, whose contribution goes beyond organizational efforts and reflects a sustained commitment to the cultivation of classical and theoretical sociology within the Romanian academic space. Equally noteworthy is the translation carried out by Vlad Cioacă, based directly on the German original, distinguished by terminological precision and conceptual fidelity—an essential achievement given the density and complexity of Weber's theoretical architecture. The introductory study authored by Cătălin Bordeianu provides a solid interpretive framework, facilitating both an understanding of the intellectual context and an appreciation of the work's contemporary relevance.



Finally, the academic and symbolic patronage of the University of Craiova lends this endeavor a welcome degree of institutional legitimacy, demonstrating that investment in the translation and dissemination of classical works remains a fundamental university responsibility.

Taken as a whole, this Romanian edition of *Economy and Society* constitutes a significant contribution to the consolidation of sociological culture in Romania and an indispensable reference for researchers, academics, and students concerned with the theoretical foundations of sociology. It is, without question, one of those editorial achievements whose intellectual impact will continue to resonate over the long term.



### Book Review:

**Felicitas Hillmann, Michael Samers (Eds.) *Cities, Migration, and Governance. Beyond Scales and Levels*. Routledge, 2023, 172 pages**

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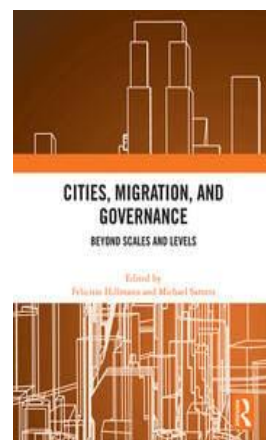
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The editors and authors of *Cities, Migration, and Governance. Beyond Scales and Levels* shows how cities, migration and urban governance are interconnected, and the research answers two major questions. On the one hand, how urban transformations, governance and planning shape / influence the life of migrants and how the lifestyle of migrants transforms cities (both formally and informally) in Europe and North America (transatlantic perspective), and on the other hand, why only cities are seen as a “solution” for the global dynamics of migration, why the urban/local have become so strong in the public discourse.

The work is structured into seven chapters (The Urban Governance of Asylum as a “Battleground”: Policies of Exclusion and Efforts of Inclusion in Italian Towns/ Relational Multiscalar Analysis: A Comparative Approach to Migrants within City-Making Processes/ Diversity Development in Postsocialist Cities: The Example of East Germany/ Fight for the City: Policing, Sanctuary, and Resistance in Chicago/ Local Path Dependency and Scale Shift in Social Movements: The Case of the us Immigrant Rights

Movement/ Live, Work, and Stay? Geographies of Immigrant Receptivity in Atlantic Canada’s Aspiring Gateways/ Homemaking and Places of Restoration: Belonging Within and Beyond Places Assigned to Syrian Refugees in the Netherlands), Introduction part. The work is structured into seven chapters (The Urban Governance of Asylum as a “Battleground”: Policies of Exclusion and Efforts of Inclusion in Italian Towns/ Relational Multiscalar Analysis: A Comparative Approach to Migrants within City-Making Processes/ Diversity Development in Postsocialist Cities: The Example of East Germany/ Fight for the City: Policing, Sanctuary, and Resistance in Chicago/ Local Path Dependency and Scale Shift in Social Movements: The Case of the us Immigrant Rights Movement/ Live, Work, and Stay? Geographies of Immigrant Receptivity in Atlantic Canada’s Aspiring Gateways/ Homemaking and Places of Restoration: Belonging Within and Beyond Places Assigned to Syrian Refugees in the Netherlands), Introduction part.

The book highlights three dominant perspectives on cities and migration, which can be found both in Europe and North America: 1. the city is only a territorial and administrative entity - a tangible unit; 2. The Urban, seen as an abstract understanding of structures, institutions and networks; 3. Diversity - the major characteristic of the urban, produced by migration and migrants.



**Book Review:**  
**Monografia Comunei Morunglav – Olt, by Cornel Manolescu.**  
**Craiova: Editura Hoffman, 2025. 383 pages.**

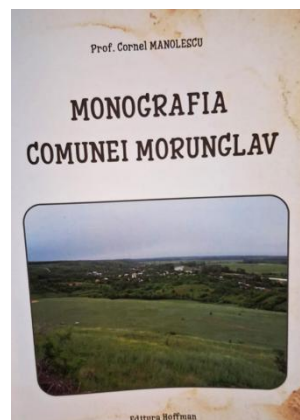
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Writing a monograph is not an easy task; it is not within everyone's reach. It requires civic responsibility, scholarly competence, courage, and tenacity. *The Monograph of Morunglav Commune – Olt*, authored by the distinguished professor **Cornel Manolescu**, proves to be a carefully conceived, deeply lived, and fully assumed project. It brings together multiple qualities that entitle us to state that it deserves appreciation and gratitude from readers, acquaintances, as well as from numerous personalities and institutions. We are dealing here with a territory marked by a strong identity of values, belonging to a community that has been well structured and harmoniously shaped over the centuries.



This substantial and valuable book (383 A4-format pages), published in 2025 by the prestigious Hoffman Publishing House, has a complex, coherent, and logical structure, demonstrating the author's systemic vision of the life and activity of a community that has been strongly consolidated over time. The eight chapters of the work, organized in an original architectural framework, present defining features of Morunglav Commune in Olt County, revealing a clearly articulated identity, specificity, and originality.

The table of contents is impressive. The author, Cornel Manolescu, offers a detailed, well-argued, and well-documented presentation of data and information concerning:

- the natural setting of Morunglav Commune (location, neighboring areas, relief, hydrographic network, climate, vegetation, fauna);
- the historical evolution of Morunglav Commune (archaeological evidence, documentary attestations, the evolution of property relations, and the participation of local inhabitants in major historical events);
- administrative development (the village council, administrative organization);
- economic life and the occupations of the inhabitants;
- the population of Morunglav Commune;
- local institutions (school and education; church and religious life; cultural center; medical dispensary; post and communications); sports activities;
- personalities native to Morunglav;
- local customs and traditions.

The 383 pages of *The Monograph of Morunglav Commune – Olt* present arguments and interpretations with strong persuasive effects. The book is the result of an impressive and sustained effort, carried out over a considerable number of years, culminating in this remarkable work that embodies the true vocation of its author, Cornel Manolescu—his scholarly rigor, dedication, responsibility, perseverance, sustained effort, and social commitment. In my view, these are the words that synthesize the truth. The author's prior editorial experience is clearly reflected in this work. His analytical capacity, as well as his ability to synthesize, has been elevated to a high level of systemic reflection.

Several conclusions clearly emerge from the reading of the book:

- The earliest documentary attestations of the settlements within the territory of Morunglav Commune – Olt are provided by the charter dated June 20, 1489; however, incidental archaeological discoveries indicate habitation in this area since prehistoric times (p. 43).
- The village of “Morânglavi” is first documented in the charter issued by Prince Vlad on June 20, 1489, “by which he grants ownership to Milco the *stolnic* and his wife Anca, and his brother Stanciu Canaenitul, and to Stanislav, over the estates of Curțișoara, Bălțanii Dobrotin, Fântâna Fagului, Iași, Morânglavi, and Spinișoru, to be their inheritance” (p. 48).
- The inhabitants of Morunglav Commune participated significantly in major historical events: the Revolution of 1848 (p. 75); the War of Independence (1877–1878) (p. 76); the Peasants’ Revolt of 1907 (p. 78); the First World War (p. 79); and the Second World War (p. 82).

#### **Personal testimonies**

With regard to the Peasants’ Revolt of 1907, I would like to make a personal confession: my grandfather—thus the grandfather of the author of this review (Marin Manolescu)—took part in this event, which affected both Muntenia and Moldova. He recounted several interesting episodes, two of which are worth presenting.

- First, in the spring of 1907, the peasants rose up en masse in the Morunglav area. The authorities sent in the army; soldiers were transported in open, uncovered trucks. A peasant from Morunglav wanted to show off, to demonstrate that he was not afraid of the soldiers. He pulled down his trousers (*ițari*) and exposed himself to them. One soldier fired his weapon. The rifles were loaded with cartridges filled with salt. No further comment is needed regarding what followed.
- The second episode is as follows. My grandfather, Ștefan Manolescu, was 11 years old in 1907, having been born in Morunglav in 1896. The rebellious population went to the manor houses, taking whatever they could. My grandfather, together with other children, entered the cellar of the manor house, where they found large winter supplies, including big ceramic pots from Oboga filled with honey, lard, and other goods. The children were dressed, as was customary at the time, in traditional folk costumes: *ițari* and long shirts worn over the trousers, tied at the waist with woven belts. My grandfather lifted the hem of his shirt and put both lard and honey inside. Needless to say, by the time he reached home, the lard had melted completely.

The economic life of Morunglav Commune has been, and continues to be, highly dynamic. Fertile soil, varied relief, and a temperate climate have enabled remarkable

economic development. The Olteț River on one side (the Olteț floodplain), favorable to vegetable farming, and the Subcarpathian hills on the other, have supported animal husbandry and diverse, productive crops. “Gura Iașului,” a locality situated at the entrance to Morunglav from Bobicești, represents the “gateway” to the Dragășani hills, where the renowned fertile vineyards begin.

**The institutions of Morunglav Commune, Olt County, receive careful, rigorous, and detailed treatment.**

The school is presented as an institution of prestige, commensurate with its importance. Education has kept pace with both time and historical change. We learn that the school in Morunglav Commune, Olt County, followed the common trajectory of similar institutions nationwide. It was shaped by events and developments of national significance. A princely charter dated March 17, 1775, signed by Prince Alexandru Ipsilanti, stipulates that “in every market town teachers of the local language should be appointed to instruct pupils in matters of common knowledge, so that they may not be inexperienced when they come of age” (p. 203, cited from Petrescu, Ștefan, *Școlile din Zona Caracal, Craiova, 1999*).

### **The “Morunglav–Morunești” School in the National Context**

The “Morunglav–Morunești” School was established in 1859. The first teacher was Badea Ioan Diaconu, who had completed two primary school grades and was appointed on March 10, 1859.

In its development, the school of Morunglav Commune, Olt County, followed a trajectory similar to that of schools in the United Principalities and later in Greater Romania—marked by advances and setbacks, successes and failures. What remains certain is that it consistently functioned as an institution of prestige, fully assuming its historically established educational mission, in step with the times. The founding of the Morunglav school must be viewed within its broader historical context. The process of establishing rural schools was long and arduous and must be associated with major events that shaped the history of the Romanian lands and, implicitly, the evolution of education in the Romanian language.

Several historical milestones may be briefly outlined.

The remarkable founders of Romanian schooling in Wallachia and Moldavia during the early decades of the nineteenth century were leading figures of Romanian Enlightenment: Gheorghe Lazăr, Ion Heliade Rădulescu, Petrache Poenaru, among others in Wallachia, joined by the Văcărești family, Conachi, D. Golescu, and many others through their literary works and initiatives promoting education. In Moldavia, Gheorghe Asachi stood out as the emblematic figure of the era. Even prior to their efforts, however, Romanian was already in use in princely chanceries and in church and monastic institutions. *Neașu’s Letter* from Câmpulung-Muscel, addressed to the Mayor of Brașov in 1521, provides incontestable proof not only that writing in Romanian existed at the time, but also that schooling was conducted in this language. Instruction in Romanian writing must therefore have begun well before 1521, when Neașu composed his letter.

The revolutionary movement led by Tudor Vladimirescu in 1821 represented a major impetus for the development of education. Tudor’s Proclamation of Padeș (1821) addressed popular demands concerning education and culture—*The Demands of the Romanian People of Wallachia*. The proclamation stipulated, under point two, that “the metropolitan see, the three bishoprics, and all major monasteries shall be

obliged to maintain schools... and to gather children of Romanian origin, both noble and poor, as well as the uneducated, to be taught at the monastery's expense" (Anghel Manolache & Gheorghe Pârnuță, 1993, *Istoria învățământului din România*, Vol. II, EDP, p. 11).

Between 1831 (the Organic Regulation) and 1848 (the Revolution of 1848), primary education underwent significant changes. The Organic Regulation functioned simultaneously as a constitution and as a legal code of ordinary provisions. Article 364 of the Organic Regulation of Wallachia recorded the state's duty to care for public education, so that the upbringing of youth would be grounded in "the beginnings of the soundest morality" (*Regulamentele Organice ale Valahiei și Moldovei*, ed. P. Negulescu & G. Alexianu, Vol. I, Bucharest, 1944, pp. 129–130).

Alexandru Ghica is considered "the first founder of Romanian schools." In 1834, Russian troops withdrew from the Principalities, and Alexandru Ghica—described as "immortal"—was appointed ruler of Wallachia. He established public schools in all towns and market centers, which contributed "greatly to the moral and even material development of the Romanian nation" (Ioan Boldescu, *Memoriu sau Notițe istorice despre școalele din Orașul Giurgiu și Județul Vlașca*, Giurgiu, 1885, p. 4). In 1837, Ghica extended this initiative to "all villages, even the smallest hamlets." As Boldescu notes, "if Gheorghe Lazăr was the first Romanian teacher, Alexandru Ghica, Prince of Wallachia, was the first founder of Romanian schools after the disastrous Phanariot period" (ibid., p. 4).

The Revolution of 1848 also constitutes a crucial milestone. The *Proclamation of Islaz* (1848), which functioned as a constitution during the revolutionary government, called for a state-run education system with a democratic orientation. Among its 22 provisions, Article 16 stipulated "equal and comprehensive education for all Romanians of both sexes."

As is well known, the Revolution of 1848 was defeated, and its immediate consequences were unfavorable for Romanian education. "All schools in the country were closed; urban schools reopened in 1851, while rural schools reopened only in 1857, during the regency of Alexandru Ghica" (Ioan Boldescu, p. 4).

Following the defeat of the revolution, Barbu Știrbei and Dimitrie Ghica reopened the schools. These two prominent political and intellectual figures succeeded in restoring the temporarily interrupted thread of Romanian-language education. On September 27, 1850, a commission appointed by Prince Barbu Știrbei submitted a report proposing a division of education into primary, secondary (gymnasium), and higher (university) levels.

After the Union of January 24, 1859, the school network in the united Romanian Principalities expanded significantly. The number of elementary schools and pupils increased, new gymnasiums and high schools were founded, teacher-training schools were established, and universities were created in Iași (1860) and Bucharest (1864). By the end of 1858, there were 1,011 rural schools with 22,940 pupils; one year later, the number rose to 2,129 schools with 53,580 pupils. In the 1860/1861 academic year, there were 2,157 rural schools with 56,460 pupils, and by 1863/1864 the number of pupils in communal schools reached 67,759. Nationwide, during the 1863/1864 academic year, there were 2,008 primary schools (including 141 urban primary schools), three secondary schools (lyceums), eight gymnasiums, seven seminaries, one school of painting (Iași), schools of medicine, pharmacy, and

veterinary science (Bucharest), two music schools, and two universities with seven faculties attended by 203 students (Spiru Haret, *Raport general asupra învățământului*, Bucharest, 1886, p. 115, cited by Fl. Diac, p. 139).

It was within this dynamic historical context—marked by upheaval and hope—that the school of Morunglav was established in 1859.

### **“Personalities Born in Morunglav Commune”**

This is a dense chapter of the monograph, referring to an impressive number of individuals born in Morunglav Commune. Their fields of achievement are highly diverse: writers and publicists, poets, schoolteachers, primary and secondary educators, university professors, army generals, school inspectors, historians, diplomats, politicians, elite athletes, and others.

### **A Subjective Perspective on the Monograph of Morunglav Commune, Olt County**

This perspective is termed “subjective” because the undersigned, Marin Manolescu, traces his origins to Morunglav.

My paternal grandfather, Ștefan Manolescu, was born here in 1896 and later married my grandmother Bălașa in Bobicești (my native commune). Consequently, the Manolescu family lineage originates in Morunglav Commune. Through the effort, dedication, and collegial support of the author of the present monograph, Cornel Manolescu, I have been able to reconstruct my genealogical tree back to the early decades of the nineteenth century. For instance, Cornel Manolescu recently informed me—quite joyfully—that my great-great-grandfather, Alecu Manolescu, was born on March 25, 1830, and that on October 6, 1892, he served as a church cantor in Morunglav (p. 242 of the monograph). His son, Constantin Manolescu, was born in 1863 (source: Olt County National Archives, Fond Protoieria Romanați, file 58/1894).

A second reason for describing our perspective on the presentation of *The Monograph of Morunglav Commune – Olt* as “subjective” lies in the fact that the work contains numerous references to individuals and personalities belonging to the Manolescu family lineage. Two such references are particularly representative.

- **First**, on pages 315–318, Constantin Manolescu, my uncle (1893–1973), is presented. He served as a school inspector in Romanați County. He graduated from the Teachers’ Training School in Craiova—today the “Ștefan Velovan” Normal School—in 1915. Over the course of his career, he obtained all professional teaching ranks (permanent certification, second degree, first degree). He participated in the First World War, during which he was wounded twice. He later served as primary education school inspector for Romanați County. In 1958, he was arrested and sentenced to ten years of correctional imprisonment for “conspiracy” against the communist regime, thus becoming a political prisoner. He was granted amnesty on April 13, 1964 (see the criminal record file, p. 317).
- **Second**, on page 247, the book presents and illustrates “the cantor Marin Manolescu.” He was, in fact, the person who baptized me at the Morunglav Church in October 1951. Born in Morunglav in 1903, he graduated from the School of Church Cantors in Craiova and was appointed church cantor in Morunglav in 1924.

### **Who Is Cornel Manolescu?**

Cornel Manolescu—the author of this monograph—is deeply devoted to the study of the historical past, to the understanding of local traditions and customs, and to the identity of the commune in which he was born and has lived. He is, above all, an archive-based researcher. At the same time, he is a man of the present, firmly anchored in contemporary realities. He was born in Morunglav in 1943 and pursued his secondary education at the “Frații Buzești” National College in Craiova, followed by studies at the three-year Pedagogical Institute and the Faculty of Natural Sciences and Agricultural Knowledge in Craiova. He worked as a teacher and obtained all teaching degrees. Between 1982 and 1984, he served as a cooperating teacher in the Kingdom of Morocco. He has published books as sole author or co-author, as well as over 100 articles, primarily focused on the historical issues of various localities and regions in Oltenia (pp. 318–320).

His parents were teachers and graduates of the “Ștefan Velovan” Normal School in Craiova. His father was mobilized during the Second World War and disappeared on the Eastern Front in the Soviet Union.

### **Selected Evaluative Remarks on *The Monograph of Morunglav Commune – Olt***

*The Monograph of Morunglav Commune – Olt* is a complex and unique work, offering a comprehensive image of the life and activity of an important locality in Olt County and in Romania as a whole. What distinguishes it from other works of a similar type is the breadth of the issues addressed, the depth of analysis, the richness of data, facts, and events considered, as well as the value and flexibility of the conclusions drawn. The conceptual “map” of the book facilitates a sound understanding of the integration of Morunglav Commune within both regional and national contexts.

The author’s professional background as a teacher is clearly reflected in the pages of the book. Both his academic specialization and the methodological rigor of that specialization are visible throughout the text. The rich content is carefully processed and distilled, resulting in persuasive ideas and conclusions. The written language employed by Cornel Manolescu—demanding in its standards—exhibits all the defining qualities of scholarly discourse: adherence to norms of systematization and clarity, respect for concision, and evident care in sentence construction and punctuation. The author achieves a high degree of communicative effectiveness.

The images included in the book—relating to events, personalities, flora, fauna, customs, and traditions—are selected with discernment and a profound respect for historical truth.

Cornel Manolescu demonstrates complete mastery of both the specialized scholarly language and the region-specific vernacular, as well as an experiential knowledge of the traditions, customs, and social norms characteristic of this Oltenian locality. The documentation is thorough, drawn from representative sources, and the information is filtered through the author’s own critical reflection. There is a genuine respect for truth: nothing superfluous, nothing omitted. The result is a valuable spiritual gift.

Hats off, Maestro!

*Marin Manolescu, from Bobicești, via Morunglav*