UNIVERSITARY JOURNAL OF SOCIOLOGY

# Revista Universitară de Sociologie

Year XXII,
no.1/2026

BELADI
EDITURA

Craiova,
Romania

**REVISTA UNIVERSITARĂ DE SOCIOLOGIE**
**UNIVERSITY JOURNAL OF SOCIOLOGY**
**REVUE UNIVERSITAIRE DE SOCIOLOGIE**

# Year XXII - no. 1/2026

**Beladi Publishing House**
**Craiova, 2026**

This journal is published by Beladi Publishing House.

**ISSN: 2537-5024**
**ISSN-L: 1841-6578**

# International Scientific Committee:

Albert OGIEN – École des Hautes Études en Sciences Sociales (EHESS), France
Laurent TESSIER – Institut Catholique de Paris (ICP), France
Lucile BONCOMPAIN – Université de Bordeaux, France
Ugo de AMBROGIO – Istituto per la Ricerca Sociale, Milan, Italy
Gilles FRIGOLI – Université Côte d'Azur (formerly Université de Nice Sophia Antipolis), France
Marie-Carmen GARCIA – Université Lumière Lyon 2, France
Bernard LAHIRE – École Normale Supérieure Lettres et Sciences Humaines (ENS Lyon), France
Efstratios PAPANIS – University of the Aegean, Greece
Azucena HERNÁNDEZ MARTÍN – Universidad de Salamanca, Spain
Maria SAMPELAYO – Universidad Camilo José Cela, Spain
Matthieu GATEAU – Université de Bourgogne, France
Marcel PARIAT – Université Paris-Est Créteil, France
Pascal LAFONT – Université Paris-Est Créteil, France
Philippe JORON – Université Paul-Valéry Montpellier 3, France
Michel CRESPY – Université Paul-Valéry Montpellier 3, France
Teodora KALEYNSKA – University of Veliko Tarnovo, Bulgaria
Vihren BOUZOV – University of Veliko Tarnovo, Bulgaria
Laura VERDI – University of Padua, Italy
Kémonthé Marius GALLON – Université Félix Houphouët-Boigny, Ivory Coast
Willy Didier FOGA KONEFON – University of Yaoundé I, Cameroon
Soufyane BADRAOUI – University of Tebessa, Algeria.

# National Scientific Committee:

Cătălin ZAMFIR – academician, Romanian Academy; Ilie BĂDESCU – corresponding member of the Romanian Academy; Doru BUZDUCEA, Maria VOINEA, Radu BALTASIU, Adrian DAN (University of Bucharest); Elena ZAMFIR, Sorin CACE (Research Institute for the Quality of Life, Romanian Academy); Ștefan COJOCARU, Daniela COJOCARU, Nicu GAVRILUȚĂ, Cristina GAVRILUȚĂ, Ion IONESCU ("Alexandru Ioan Cuza" University of Iași); Mihai IOVU (Babeș-Bolyai University of Cluj-Napoca); Laurențiu ȚÎRU, Cosmin GOIAN (West University of Timișoara); Floare CHIPEA (University of Oradea); Nicolae PANEA, Adrian OTOVESCU, Cristina OTOVESCU (University of Craiova); Dumitru BATÂR, Horațiu RUSU ("Lucian Blaga" University of Sibiu); Claudiu COMAN ("Transilvania" University of Brașov); Lucian MARINA, Călina BUȚIU ("1 Decembrie 1918" University of Alba Iulia); Lavinia POPP ("Eftimie Murgu" University of Reșița); Maria CONSTANTINESCU (University of Pitești), Maria PESCARU (National University of Science and Technology Politehnica Bucharest - Pitești University Center); Lavinia BETEA ("Aurel Vlaicu" University of Arad).

**Founder Director**: Dumitru OTOVESCU

# International Indexing

**Currently indexed in:**

ERIH PLUS – European Reference Index for the Humanities and Social Sciences; DOAJ – Directory of Open Access Journals; Ulrichsweb – Ulrich's Periodicals Directory; EBSCOhost; CEEOL – Central and Eastern European Online Library; Index Copernicus; RePEc – Research Papers in Economics; HeinOnline; CiteFactor; IDEAS (RePEc); CitEc; LogEc; DRJI – Directory of Research Journal Indexing; SafetyLit; WorldCat; ROAD – Directory of Open Access Scholarly Resources; Genamics JournalSeek; NewJour – Georgetown University Library; GIGA – German Institute of Global and Area Studies Information Centre.

| **Indexed in:** | |
|---|---|
| **DOAJ** | 2021-present |
| **ERIHPlus** | 2020-present |
| **UlrichsWeb** | 2018-present |
| **EBSCOHost** | 2018-present |
| **CEEOL** | 2014-present |
| **Index Copernicus (ICV 2019 - 100.00)** | 2017-present |
| **RePEc** | 2018-present |
| **HeinOnline** | 2004-present |
| **CiteFactor (IF=1.48)** | 2021-present |
| **GESIS** | 2004-2017 |

**Year XXII - no. 1/2026**

# REVISTA UNIVERSITARĂ DE SOCIOLOGIE

Electronic and Printed Journal
(http://www.sociologiecraiova.ro)

**Editorial Board:**
Claudiu COMAN, Laurenţiu ŢÎRU, Lavinia POPP, Cristina ILIE, Marius VASILUŢĂ, Mădălina OTOVESCU, Emanuela BRAN, Cristina BULARCA

**Editorial Secretary:**
Vlad-Ovidiu CIOACĂ

**Director,**
Maria-Cristina OTOVESCU

**Editor in chief,**
Adrian OTOVESCU

Contact: University of Craiova, 13, A.I Cuza Street, c. 167B
E-mail: rus.craiova@gmail.com

# TABLE OF CONTENTS


Requirements for Managing Primary Schools and the Inevitability of Overcoming Obstacles in Light of Digital Transformation **10**
**Belaidouni LAKHDAR, Bouhlala SALAH (ALgeria)**

Layered Belonging: Ethnicity, Religion and the Construction of National Identity In Kosovo **27**
**Camelia Cristina KOJQIQI (Romania)**

The Experience of Meaning in Life and Life Satisfaction: The Mediating Role of Positive Affect and Hope **38**
**Florena ANTONESCU (Romania)**

Dimensions of Poverty in Romania **60**
**Cosmin-Constantin SICREA (Romania)**

Actions vs Expectations. Gender-Based Analysis of the Impact of Collective Thinking on Personal Behavior and Identity **74**
**Mario-Beniamin BĂLAN, Atalia ONIȚIU (Romania)**

The Concept of Trust and the Crisis of Trust in the Educational Community **87**
**Amel KEZIZ, Fadhila HAMEL (Algeria)**

Professional Mobility as a Response to Perceived Organisational Injustice: The Role of Organisational Loyalty and Turnover Intention in the Romanian IT Sector **98**
**Diana MOGA (AVIRVAREI) (Romania)**

Degree of Urbanization and Participation Rate in Education and Training in CEE Countries **114**
**Luminița IOSIF (Romania)**

The Dynamics of Identities in Kosovo: The Emerging of Islamic Religion as an Identity Marker **126**
**Ștefan Eugen BRUNO, Camelia Cristina KOJQIQI (Romania)**

Redefining Privacy: Evolving Definitions, Emerging Interpretations, and Challenged Boundaries **138**
**Doina GAVRILOV (Romania)**

Before the Welfare State: The Social Functions of the Byzantine Church **154**
**Protosyngellos Rafael (Marius STANCIU) (Romania)**

Integration of Modern Technologies in the Educational Process for Social-Civic Education in Primary School **171**
**Cristina-Maria PESCARU (Romania), Elena-Cristina CÎRSTEA (Republic of Moldova), Maria PESCARU (Romania)**

The Role of the Police in the Pre-Investigative and Investigative Procedure: A Comparative Legal Presentation **188**
**Nenad BINGULAC, Miloš STAMENKOVIĆ (Serbia)**

Freedom of the Written Press in Algeria: Between Guarantees and Legal Obstacles **203**
**Hadef KHADIDJA, Farek SAID (Algeria)**

Youth Trajectories and Social Representations: Experiences, Pathways, and Frameworks of Perception Among Young People **220**
**Naima HADJEB, Mohamed Akli FARADJI (Algeria)**

Psychosocial Alienation Among Digital Content Followers on TikTok: The Structural Friction Between Virtual and Real Identities. A Digital Ethnographic Study **233**
**Hanane BOULBAZINE, Faiza BOUZID (Algeria)**

Bookclubs : The Emerging Phenomenon, an Alternative to Social Media, with Untapped Potential **246**
**Lorena ȚĂRUȘ (Romania)**

Violence Associated with Armed Conflicts: The Algerian Experience **256**
**Atika OUKIL (Algeria)**

Caring for a Parent with Alzheimer's Disease in Algeria: Lived Experiences, Gendered Roles, and the Invisible Commitment of Close Relatives **267**
**Aicha BENABED (Algeria)**

The Impact of Drug Use on Young Delinquents: Social, Legal and Economic Consequences **278**
**Dan Constantin AGHEORGHIESEI (Romania)**

International Standards and the Degree of Their Inclusion in the Educational Learning Process **287**
**Lynda BENBESSAI, Samir HAFFACI, Amine AMIMOUR, Hamza ZERGUI, Abdelhak GASMI (Algeria)**

The Company Car as an Institutionalized Privilege: A Sociological Perspective on Occupational Inequalities **296**
**Iulian NEGRU (Romania)**

Socialization as a Mechanism of the Child's Social Construction in the Era of Globalization **308**
**Mohammed DHIB, Bouras FAISSAL (Algeria)**

Democratic Backsliding in Contemporary Societies: Theories, Mechanisms, and Conceptual Controversies **317**
**Vlad Ovidiu CIOACĂ, Dorin Cosmin VASILE (Romania)**

Peripheral Demographic Transitions and the Unrealized Demographic Dividend: A Sociological Analysis of Mauritania in the Sahelian Context **328**
**Mohamed BABOU, Leila BOUDIA (Algeria)**

Optimizing the Experience of Meaning: An Evaluation Model **340**
**Florena ANTONESCU (Romania)**

The Structure of National Identity in Post-War Kosovo: A Layered and Hybrid Configuration **353**
**Camelia Cristina KOJQIQI, Ștefan Eugen BRUNO (Romania)**

The Development of Social Protection in Post-Communist Romania **366**
**Cosmin-Constantin SICREA (Romania)**

The Impact of New Role Models (Influencers) Through Social Media on the Decline of Traditional Role Models (Parents) from the UVT Perspective Theory: A Field Study on Some Algerian Youth **376**
**Adel CHIHEB (Algeria)**

# Requirements for Managing Primary Schools and the Inevitability of Overcoming Obstacles in Light of Digital Transformation

**Belaidouni LAKHDAR**
PhD, University of Oran 2 (Algeria)
Email: Lakhdar-79@outlook.fr

**Bouhlala SALAH**
PhD, University of Mostaganem (Algeria)
Email: salahinsp1@gmail.com

***Abstract:*** *Digitalization has become a central concern in educational administration and an increasingly important mechanism for modernizing the management of primary schools. This article examines the requirements for implementing digital administrative management in Algerian primary schools and the obstacles that continue to delay this transition. Positioned at the intersection of educational administration, school leadership, and digital transformation, the study adopts a descriptive-analytical approach based on relevant literature, regulatory texts, previous research, and administrative data concerning primary schools in Relizane Province. It clarifies the concepts of digital transformation and digital management, analyzes the responsibilities of school principals and institutional partners, and assesses the current state of technological infrastructure and digital practices. The findings indicate that implementation is constrained by unequal internet access, limited equipment and funding, insufficient digital competencies, overlapping administrative responsibilities, resistance to change, and information-security concerns. Successful digital transformation therefore requires reliable infrastructure, continuous professional training, coherent institutional and legislative support, adequate financing, and clearer coordination among responsible authorities. The article concludes that digitalization is no longer optional but a necessary condition for improving administrative performance, service delivery, and the quality of primary education.*

***Keywords:*** *digital transformation; educational administration; primary schools; administrative performance; technological infrastructure*

## 1. Introduction

Digitalization and technological advancements have fundamentally transformed the ways in which information is generated, stored, integrated, and utilized. In this context, digital transformation becomes an innovative driver within educational institutions across all levels when it is effectively adopted to strengthen the core foundations of academic functions. Accordingly, educational institutions are required to rethink how digitalization can enhance their creativity and improve the execution of their assigned missions.

However, despite the rapid expansion of digital technologies, the education sector continues to face numerous challenges in keeping pace with ongoing technological developments that have significantly reshaped global dynamics. This situation has widened the gap between countries in terms of technological advancement and educational performance. In Algeria, although the state initiated comprehensive educational reforms starting in 2003—affecting curricula in their

broadest sense—the efforts accompanying these reforms in the field of digitalization remain below the expected level.

This is largely because the effective implementation of digital transformation requires the adoption of a comprehensive educational philosophy and a coherent public policy framework. Such a framework should prioritize the development and upgrading of infrastructure, including reliable internet connectivity, the provision of modern technological tools., and the establishment of facilities tailored to the needs of each educational institution and region. Furthermore, it necessitates a transformation in the prevailing training system—both in terms of content, which remains largely traditional and insufficient to meet the professional demands faced by graduates of teacher training institutes, and in terms of human resource development. Indeed, the mechanisms and criteria for selecting and preparing trainers remain inadequate, thereby limiting the effective integration and activation of digital practices within educational institutions.

If the digital gap previously highlighted between countries can be, to some extent, justified, what then explains its persistence and widening across educational levels (secondary, middle, and primary)? Regardless of the arguments advanced in this regard, the primary school remains at the center of ongoing debate among its stakeholders, with administrative bodies often struggling to meet the demands of modern management beyond prevailing traditional patterns.

In this context, the adoption of a digital transformation strategy within primary schools largely depends on the school principal's ability to shift institutional performance from routine administrative practices to a professional management approach grounded in planning, organization, implementation, coordination of efforts, and evaluation. Modern information and communication technologies (ICT) seek to promote best practices that enable educational institutions to achieve higher levels of performance, quality, and effectiveness. They also provide opportunities to save time and effort, enhance communication, and increase operational efficiency, ultimately contributing to improving the overall image of the institution (Benabderrahmane and Sassi, 2017: 1).

The true concept of digitalization, as a core component of primary school administrative performance, hinges on the necessity of transitioning from traditional administrative practices to modernized systems based on information and communication technologies (ICT). This transition aims to facilitate access to accurate data and information, while ensuring the delivery of faster and more cost-effective services in an era characterized by rapidly evolving knowledge-based challenges.

Accordingly, this shift requires the provision of essential resources and conditions that enable school administrators to effectively manage and operate within a digital environment. This includes the modernization of administrative digital systems so that they become capable of achieving the model of a "quality school" aspired to by society (Battat, 2021, p. 122).

The digital transformation of education has been underway for decades at varying paces across the world (Qayyum, 2022: 1), as evidenced by numerous studies. However, significant barriers continue to hinder the effective implementation of digitalization in schools. For instance, the study conducted by Afouna and Jallad (2021) found that approximately 75% of the obstacles are related to internet connectivity. The

results also revealed statistically significant differences attributed to the gender variable in favor of males, as well as significant differences in the second domain of the questionnaire based on the directorate variable.

The study further recommended the necessity of providing financial support to acquire tablets and charging cabinets, upgrading school infrastructure with reliable internet networks, and training teachers and educational supervisors on the effective use and integration of interactive technologies (Afouna and Jallad, 2021: 477).

Furthermore, studies by Agélii Genlott and Grönlund (2016) and Glover et al. (2016) have emphasized that digitalization, when not deeply embedded in pedagogical practices and methods, may fail to transform educational practices or enhance students' learning outcomes.

Additionally, a study by Mensel (2023) addressed several issues related to e-administration in Algeria, beginning with an analysis of the digital transformation trajectory adopted by the state and examining the implications of activating e-administration on the reality of services and operations. However, Islam and Grönlund (2016: 216) concluded that an excessive focus on technological aspects, and the use of technology in itself, does not necessarily lead to change or improvement in educational practices. The study further argued that future research and practice should place greater emphasis on pedagogical, organizational, and leadership dimensions, and their contribution to advancing pedagogy in ways that enhance the outcomes of the teaching–learning process.

The COVID-19 pandemic further accelerated this transformation by compelling educational institutions to adopt remote learning and digital administrative practices within a very short period. At the same time, it exposed major structural weaknesses, including unequal access to digital devices, limited internet connectivity, insufficient teacher training, and inadequate institutional preparedness (Otovescu, 2023). Consequently, the pandemic demonstrated that digital transformation is no longer an optional modernization process, but an essential condition for ensuring educational continuity, resilience, and equitable access to learning.

In light of these challenges, and the varying findings of previous studies regarding the use of digitalization, the present study emerges as an attempt to better understand the mechanisms of administrative management in primary schools within the context of digital transformation—between the necessity of transition and the constraints of implementation. Accordingly, this study seeks to address the following research questions:

- What is the concept of digitalizing primary school administration?
- What are the requirements for implementing digitalization in the management of primary school administration?
- Does the necessity of implementing digitalization in primary school administration require a fundamental shift from traditional administrative practices, deeply rooted in inherited habits, toward renewed knowledge aligned with modern management approaches?
- Does the imperative of digitalizing administrative management in primary schools necessitate a transformation in the mindset of those responsible for the education sector in a way that reduces disparities among the three educational levels (primary, middle, and secondary)?

- What are the main obstacles that hinder the transition from traditional administrative practices in primary schools to the adoption of digitalization in keeping with technological developments?
- What are the implications and consequences of delays in adopting digitalization in the administrative management of primary schools?

## 2. Basic Concepts of the Study

### 2.1. Digital Transformation

Digital transformation refers to the degree of utilization of digital technologies within educational systems. It encompasses a set of individuals, organizations, and processes designed to support learning in a structured environment.

Digital transformation can be defined as "the extent to which individuals and institutions use digital technologies in learning processes and objectives within an organized environment" (Qayyum, 2022: 2)

### 2.2. Digital Management

Digital management refers to the use of digital technologies and the internet in the administrative management processes within various institutions and organizations. It aims to transform traditional procedures into digitalized methods characterized by flexibility and efficiency, thereby enabling faster and more effective access to information and improving overall administrative performance.

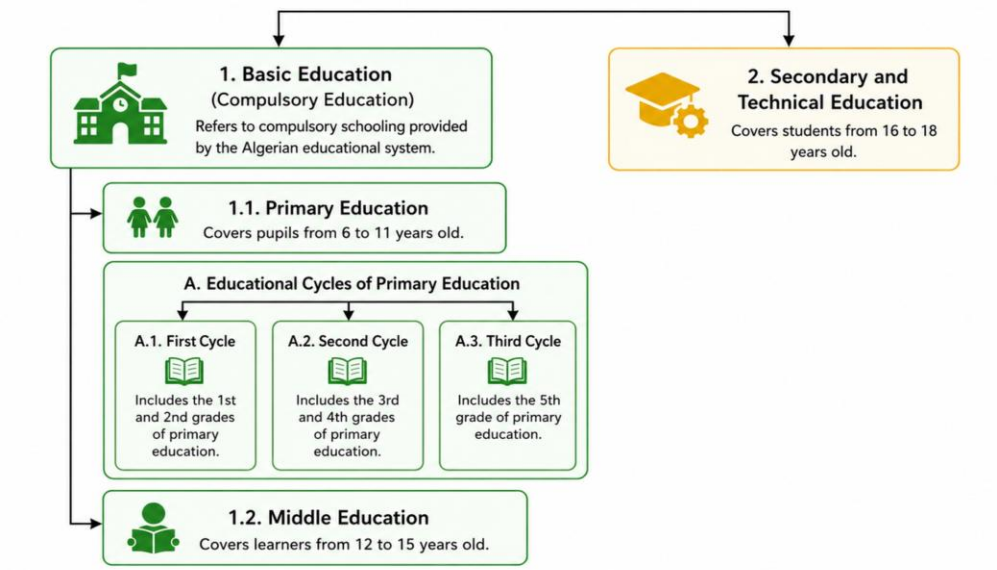
It is defined in this study as the "use of modern technologies based on the ability to interact with the internet to facilitate direct communication between the primary school principal and sector officials, including inspectors (across different specializations), as well as indirect communication with the Directorate of Education and its services. It also includes interaction between the principal and school partners such as pupils and their parents (available through the digital platform space), and others electronically without temporal or spatial constraints" (Amar, 2013: 175).

### 2.3. Primary School

A primary school is considered a public educational institution, according to Decree No. 65 dated 12 July 2018, which defines the modalities for organizing and operating the educational community. It ensures the implementation of the principles and values stated in Article 4 of the same decree (Ministry of National Education, 2018, pp. 43–54).

According to Article 13 of Executive Decree No. 16-226 dated 25 August 2016, the primary school, within the framework of basic education, provides compulsory primary education over a period of five (5) years, from the age of six (6) to eleven (11). Furthermore, according to Article 14 of the same decree, the primary school may also accommodate preschool education pupils in kindergarten sections, in accordance with the provisions of Article 40 of Law No. 08-04 dated 23 January 2008 (Official Journal of the People's Democratic Republic of Algeria, 2016).

**Figure 1. Classification of Schools in the Algerian Educational System**

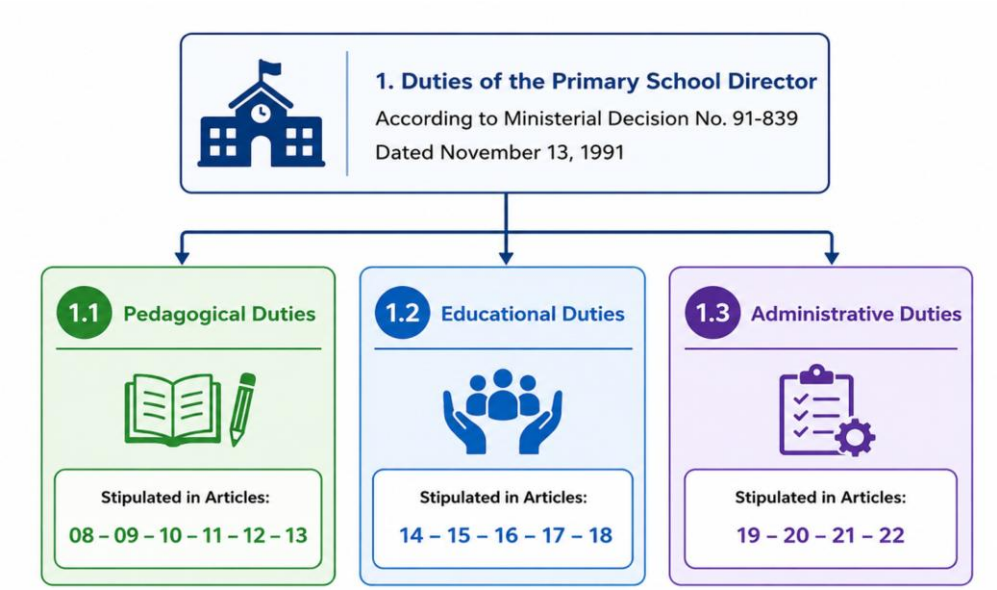



***Source:*** *prepared by the researcher*

### 3. Administrative Management

Administrative management is considered one of the three core dimensions of management entrusted to the primary school principal, aimed at ensuring the effective performance of their duties. The scope of administrative management is reflected in the provisions of Article 37 of the aforementioned decree, whereby the administration of the educational institution is responsible for communicating the internal regulations, timetables, schedules of complementary activities, and the calendar of term examinations to pupils and their parents through available communication channels. These include official correspondence, the school communication notebook, fax, and electronic means such as short messages (SMS), email, and other similar tools.

**Figure 2. Tasks Assigned to the Director of the Basic School Annex (Former Designation)**




***Source:*** *prepared by the researcher*

### 4. Partners and Stakeholders

#### 4.1. Partners

A partner refers to any individual or entity that maintains a permanent relationship with the educational institution, particularly:

- Registered trade unions.
- Accredited parents' associations.

#### 4.2. Stakeholders

A stakeholder refers to any individual or entity that contributes to school life through activities related to the educational institution, in accordance with the applicable legislation and regulations, particularly:

- Various ministries.
- Official national bodies.

### 5. Roles of Partners and Stakeholders in Educational Institutions

According to Article 99 of Decree No. 65 mentioned above, partners and/or stakeholders, each within their respective fields of competence, contribute to the promotion of school life through the following:

1- Exchanging information in a manner that serves the interests of the educational institution.

2- Ensuring continuous coordination and consultation to support the proper functioning and stability of the institution.

3- Promoting quality education through fostering teamwork and encouraging both individual and collective initiatives.

4- Encouraging and valuing all student-led activities related to citizenship values, responsibility, and solidarity.

5- Highlighting and supporting the innovations and creative contributions of members of the educational community, thereby enhancing the positive image of the institution.

**Figure 3. Nature of Partners and Stakeholders in Educational Institutions**

***Source:*** *prepared by the researcher*

## 6. Theoretical Framework

Addressing the topic of digitalization in the management of primary schools involves two key dimensions. The first relates to the need for these institutions to activate digitalization as an essential mechanism in modern administrative management, given its potential to positively influence performance, improve school life, and enhance educational outcomes in line with ongoing reforms. The second dimension focuses on examining the current state of digital administration within these institutions, through an analysis of the trajectory of digital transformation in the country and the practical outcomes of its implementation in primary schools.

### 6.1. Digitalization

#### 6.1.1. Definition of Digitalization

Digitalization in information institutions refers to the process of converting information resources from their traditional formats into digital forms. This process is undertaken to provide a wider range of appropriate information resources for users. It

also contributes to the long-term preservation of information resources and facilitates their dissemination to a broader audience worldwide (Al-Khathami, 2010: 76).

Al-Hamza (2011: 72) defines digitalization as "a technological method for storing information by converting it from its traditional form into a digital format based on a binary system (0 and 1), where each format contains values independent of one another. Digitalization thus enables the transformation of conventional files into electronic files."

Digitalization can also be defined as electronic (digital) communication that occurs during formal and informal interactions between individuals, between institutions, or among both, without regard to constraints of time, place, or physical distance. It operates independently of traditional modes of communication, whether paper-based or face-to-face verbal interactions.

### 6.1.2. Rationale and Necessity for Activating Digitalization in Primary School Administration

Globalization, the rapid development of advanced societies, and the repercussions of the COVID-19 pandemic have accelerated the emergence of digital administration and improved its performance. This has been achieved through the simplification of administrative procedures, particularly in obtaining various documents such as school certificates and report cards, as well as facilitating student transfers between schools. Consequently, these developments have contributed to reducing bureaucratic practices and redefining the relationship between parents and school administration by enabling more efficient service delivery.

In addition, educational reform and development processes are based on clear visions and perspectives, particularly in light of the rapid knowledge and technological explosion. It has therefore become increasingly important to keep pace with these developments across all fields, especially in education in general. Numerous studies have addressed the importance of integrating digitalization into the educational sector, particularly in primary school administration, including the study conducted by Cherner and Curry (2017).

This study aimed to examine the impact of using digital educational technologies in training teachers to develop their digital skills, in order to benefit from contemporary digital learning tools. The developmental approach was adopted through the design of a training program. The study was applied to 17 male and female students specializing in teaching English language and social studies at Cherry University in the United States of America.

The results of the study indicated the effectiveness of digital educational technologies in training teachers and developing their digital learning skills. The study also emphasized the importance of considering teachers' cognitive needs regarding digital educational technologies and taking into account their perspectives to ensure the effective development of education.

A study by Schmoelz (2018) aimed to investigate the effectiveness of learning activities using digital storytelling techniques. The sample consisted of 25 secondary school students in Vienna, and the experimental method was adopted. The study employed an experimental treatment based on digital storytelling, and interviews

were conducted with 10 pre-service students and teachers. Digital technologies were used as tools for digital narrative production.

The results showed the effectiveness of digital storytelling in developing students' creative abilities in composing and narrating digital stories using available technological tools. The technique also contributed to increasing classroom interaction and learning activities among students. Moreover, learners expressed greater enjoyment and engagement in learning through digital storytelling.

In particular, primary school administration also requires the investment of human capital capable of renewal, creativity, and change. This necessitates that those responsible for the educational process make effective use of technological tools, especially computers and the internet, and employ them in electronic administrative management processes. Such practices enhance the smooth interaction between stakeholders involved in administrative management and others (Salam, 2009: 23).

Accordingly, there are several reasons that have led many institutions to adopt digitalization, including the need to manage the vast amount of digital information, avoid the loss of original information sources, and facilitate the search and retrieval of data. In addition, digitalization contributes to reducing institutional costs and improving efficiency.

Moreover, it enables the provision of information services through new technologies, such as selective dissemination of information, machine translation, and the rapid transfer of information between individuals and institutions, among other advantages.

### 6.2. The Reality of Administrative Management in Primary Schools in Light of Technological Development

Improving the performance of the primary school principal—at the administrative, educational, and pedagogical levels—has become a fundamental requirement in light of ongoing changes, particularly current technological development and globalization, which have become an unavoidable reality that individuals must adapt to positively. Considering the impact of administrative performance on learners' achievement, and given the specific nature of primary schools compared to other educational stages (middle and secondary), stakeholders in the education sector are required to engage more effectively in this process.

This responsibility is shared between the Ministry of National Education, represented by the local education directorates at the regional level and the central administration, and the Ministry of Interior and Local Authorities, starting from the municipality, district, and province levels, which are entrusted with the management and provision of school infrastructure and facilities, in accordance with Executive Decree No. 16-226 dated 25 August 2016, which establishes the model statute of the primary school.

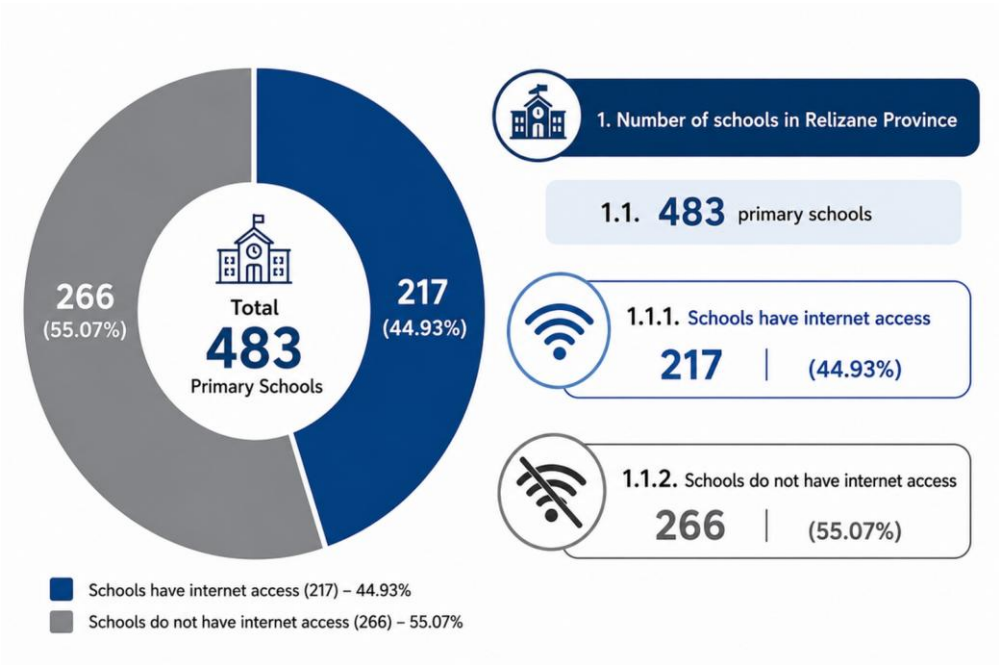
The efforts in this domain can be described as considerable and continuous. In light of the profound transformations witnessed in the education sector in Algeria as a result of reforms initiated in 2003 and continuing to the present day, substantial resources have been allocated to support the digital positioning of educational institutions across different levels. This has been reflected in the provision of modern

technological tools. to secondary and middle schools, with most of them, according to the researcher's knowledge, being connected to the internet.

However, the situation in primary schools remains below the required level, particularly with regard to internet connectivity. Despite this, a significant budget has been allocated for the rehabilitation of primary schools at the Province level, including the renovation and upgrading of schoolyards and various facilities and infrastructure.

Regarding the availability of internet connectivity in primary schools, Figure 4 below illustrates the number of primary schools in the Relizane Province that are either connected or not connected to the internet. This provides a clearer overview of the current situation concerning digital infrastructure within these institutions.

**Figure 4. Classification of Primary Schools in Relizane Province by Internet Availability, Academic Year 2022/2023**




***Source:*** *prepared by the researcher*

It is worth noting that during the current academic year (2022/2023), the implementation of a project aimed at generalizing the use of tablets in some primary schools has been initiated. This initiative seeks to reduce the burden of school bags for pupils in the third, fourth, and fifth grades of primary education, provided that the total number of pupils in these three levels combined within the same school does not exceed 90 students.

A total of 14 schools out of 483 schools in the Relizane Province have benefited from this initiative, representing less than 3% of the total number of primary schools. This step reflects the state's efforts toward the effective implementation of digitalization across schools nationwide. However, despite these efforts, the initiative did not receive the approval and satisfaction of some school principals, including those whose schools benefited from the program.

This dissatisfaction is mainly attributed to several factors, most notably the lack of internet connectivity in these schools on the one hand, and the insufficient fulfillment of municipal responsibilities on the other. These shortcomings include inadequate provision of security services, lack of proper protective systems such as secured storage cabinets, and other logistical deficiencies. Even when responses are provided by the relevant authorities, they are often significantly delayed.

### 6.2.1. The Reality of Digitalization Implementation in Primary Schools

What distinguishes primary schools is their specificity compared to other educational institutions at different levels, based on several factors, including:

A large proportion of primary schools are located in remote areas (rural or semi-urban at best).

Most primary school principals rely on their personal means, such as mobile phones or 4G modem devices, to activate digitalization within their schools in order to carry out assigned administrative tasks, particularly those of an urgent nature, such as responding to various official correspondences received via institutional email created for this purpose. Some principals also resort to using Facebook pages or other personal communication tools to interact with partners, stakeholders, and various institutions, in the complete absence of adequate technological communication resources within their offices.

The shared administrative authority over primary schools between the Ministry of National Education and the Ministry of Interior and Local Authorities has made this institution a subject of coordination challenges and overlapping responsibilities among multiple stakeholders, which does not always serve the interests of the school or its personnel. In addition, primary schools attract a considerable number of parents, who are considered the closest partners to the institution compared to other educational stages.

This is mainly due to the specific nature of pupils at this level, who require greater care, follow-up, and supervision as a result of the developmental needs characteristic of this stage, in contrast to middle and secondary education levels, where learners are relatively more autonomous.

It is also worth noting that a recent agreement was concluded between the Ministry of Interior, Local Authorities and Urban Planning and Algeria Telecom on 04-07-2024, aimed at providing all primary schools with internet connectivity.

### 6.2.2. Areas of Primary School Principals' Use of Digitalization

According to Article 16 of Decree No. 65 referred to above, the principal of an educational institution is responsible for promoting the use of information and communication technologies (ICT) and ensuring the fluid circulation of information among members of the educational community. This is achieved through the use of websites, digital platforms of the educational system, and various dedicated spaces (for pupils, parents, and staff).

Article 91 of the same decree further stipulates that, in order to enable parents to fulfill their assigned role, the educational institution must provide them, through the available communication channels, with the following information:

In this context, it is also worth noting that a recent agreement was signed between the Ministry of Interior, Local Authorities and Urban Planning and Algeria Telecom on 04/07/2024, aiming to provide all primary schools with internet connectivity.

a- Students' timetables and any changes that may occur to them.

b- Students' delays, absences, and recorded behavioral issues.

c- Students' academic results obtained throughout the school year, as well as the scheduling of cultural, sports, and recreational activities for their benefit.

d- Informing parents about the registration dates and periods for their children in preschool education and the first year of primary education.

### 6.2.3. Obstacles to the Generalization of Digitalization in Primary Schools

Despite initiatives that can be described as positive and aimed at ensuring the success of digital administration, their implementation is still progressing at a slow pace due to several constraints that hinder their proper application. These include a lack of material and financial resources, as well as human resource limitations due to the absence of specialized competencies. There are also technical obstacles, such as the administration's insufficient preparedness to ensure information security (Morkab, 2020: 90).

According to Rabie (2019), and considering the current situation of primary schools, several obstacles can be identified that hinder the generalization of digitalization in this vital institution. These constraints are mainly attributed to:

a- The limited material resources allocated to primary schools, compared to those provided to other educational institutions such as middle and secondary schools.

b- The disengagement of the supervisory authorities of primary schools from fully assuming their responsibilities, particularly in terms of equipment provision, due to the shared guardianship between the Minister of National Education and the Minister of Interior and Local Authorities. This persists despite the issuance of Executive Decree No. 16-226 dated 25 August 2016, which establishes the model statute of the primary school, particularly Article 02 thereof.

c- The high financial costs associated with the implementation of digitalization projects, as this process requires the provision of equipment such as scanners, computers, and software for operating and displaying digital information resources. These financial burdens constitute a major constraint hindering the effective field implementation of the concept of digitalization.

d- The slow pace of digital transformation processes, which results from the lack of a clear and comprehensive vision of digitalization projects among those responsible for their implementation, as well as insufficient awareness of the importance of this aspect in improving the performance of school actors.

e- The insufficient awareness among some officials, which delays the digitalization process. The same applies to beneficiaries themselves, who often lack the necessary experience in using and benefiting from digitized information resources.

Based on this, it is necessary to emphasize that most primary school principals are in urgent need of comprehensive training in computer skills and the effective use

of information and communication technologies (ICT) in administrative tasks. This need is further highlighted by the limited effectiveness, according to the researcher's view, of pre-service training programs provided to principals before assuming their positions, particularly in relation to information and communication technologies.

## 7. Requirements for the Success of Digital Administrative Management

### 7.1. Technological Infrastructure

Technological infrastructure, including internet access, devices, and software, constitutes a fundamental prerequisite for implementing digital administration, as digital transformation cannot be achieved without adequate technological resources (World Bank, 2020: 67).

### 7.2. Digital Competencies of Human Resources

The success of digitalization is closely linked to the extent to which school principals and teachers possess digital skills, which requires continuous training and professional development programs (Redecker, 2017: 29).

### 7.3. Institutional and Legislative Support

The existence of a supportive legal and organizational framework is considered one of the most important factors for the success of digitalization through the enactment of regulations governing the use of technology in education (UNESCO, 2019: 15).

## 8. Challenges of Implementing Digital Management in Primary Schools

### 8.1. The Digital Divide

The digital divide is reflected in disparities in access to technology between urban and rural areas, which hinders the widespread implementation of digitalization (Van Dijk, 2020: 102).

### 8.2. Resistance to Change

Some actors within the educational environment demonstrate resistance to digital transformation due to their attachment to traditional management patterns and practices (Fullan, 2016: 78).

### 8.3. Lack of Funding

Digitalization projects require substantial financial investments, which represents a major obstacle for many educational institutions (Kozma, 2011: 56).

### 8.4. Information Security Issues

Cyber security is considered one of the major challenges facing digital administration, particularly with regard to protecting students' and institutions' data (ISO, 2018: 12).

## 9. Conclusions

Through this research paper, we have sought to highlight the challenges facing those responsible for the education sector in the process of continuing the mechanisms for activating reform. Given that all stakeholders aspire to achieve a quality-based

school, the imperative of reconsidering the current mechanisms—described as traditional—in the management of primary schools becomes unavoidable. This is particularly important as the primary school constitutes a foundational stage entrusted with accompanying a sensitive age group, and it holds such significance that it requires stakeholders to adopt approaches that contribute to meeting learners' needs and ensuring the requirements of healthy development.

This, in turn, contributes to the development of learners' personalities in all dimensions in order to achieve balance and normal growth. Consequently, this calls for those in charge to ensure proper support and follow-up through modern pedagogical and psychological approaches.

Hence, the importance of the effective operationalization of digitalization in primary schools becomes evident. It has become a widely demanded necessity aimed at moving beyond the current administrative management system, which has been described as routine and bureaucratic, and which has constrained the prospects of this institution in achieving a quality-based school model. The imperative of implementing digitalization as a mechanism for improving administrative performance in primary schools has become increasingly urgent, given its positive implications for both pedagogical and educational outcomes. Achieving this objective requires addressing all existing challenges and adopting the most relevant recommendations, which can be summarized as follows:

- Conducting field (applied) research that would make it possible to obtain a clear and comprehensive understanding of the issue of digitalization within this context, from the perspective of the stakeholders themselves, namely primary school principals.

- Efforts should be made to change entrenched mindsets that have become accustomed to routine administrative practices and that resist any form of change aimed at improving the managerial performance of primary school principals through various means. These include motivating and encouraging principals to innovate and be creative within their field of specialization, as well as providing in-service training to enable them to acquire full proficiency in the use of modern technological tools.

- Reforming the methods adopted for selecting personnel entrusted with the management of educational institutions, as well as revising the current training methodology by adopting a competency-based approach. This approach should focus on training teachers, supervisors, and school principals to proficiently use tablets and modern digital educational software, in addition to effectively employing information and communication technologies (ICT), ensuring full mastery of their applications and areas of use.

- The search for alternative models to the current governance of primary schools, through which a gradual disengagement from the system of shared supervision over primary education institutions may be achieved, given the negative implications of this dual governance on the performance of such establishments. This also includes reducing disparities between primary education and both middle and secondary education levels, a demand that has long been advocated by primary education staff, as well as by parents and their representatives through parents' associations and other stakeholders. It is worth

recalling that the municipality—according to Article 20 of the aforementioned decree—is responsible, in relation to the construction and equipping of primary schools, in particular, for the following:

1- The implementation of primary schools and all necessary accompanying infrastructure, in accordance with the standardized specifications for school buildings stipulated in Article 6 of the aforementioned decree.

2- The provision of primary schools with school furniture and equipment, as well as all necessary facilities and means to ensure the proper functioning of these establishments, including minor maintenance works and routine repairs.

3- Ensuring the maintenance of accompanying infrastructure, as well as the cleanliness and security of primary schools.

4- Covering expenditures related to the provisioning of primary schools (in accordance with Article 21 of the same executive decree). However, this remains largely a matter of "ink on paper," insofar as there is no tangible implementation of the provisions of the aforementioned articles in this regard across most municipalities of the country, if not all.

5- The necessity of adequately equipping the infrastructure of primary schools, particularly those located in rural areas, and the strict and literal implementation of the provisions set out in Article 10 of the aforementioned executive decree when constructing and establishing primary schools.

**References**


1. Afouna, S., and Jallad, S. (2021). The role of school principals in implementing the policy of digitalizing education in schools. *Arab Journal of Scientific Publishing, 31, 476–501.* Retrieved December 28, 2025, from https://staff.najah.edu/ar/publications/11964/
2. Al-Hamza, M. (2011). *Digital libraries and electronic publishing of documents*. Al-elmayah House for Publishing and Distribution
3. Al-Khathami, M. B. D. A. (2010). Digital transformation projects and experiences in information institutions: A study of adopted strategies. *RIST Journal, 19(1), 12–45*. Retrieved February 03, 2026, from https://www.asjp.cerist.dz/en/article/45943
4. Amer, T. A. R. M. (2007). *Distance education and open education*. Al-Yazouri Scientific Publishing and Distribution House.
5. Battat, N. (2021). Digitalization and its contributions to the modernization of sports administration. *Journal of Sports Performance Sciences, 3(1).* Retrieved November 9, 2025, from https://www.asjp.cerist.dz/en/article/165821
6. Ben Abdelrahman, S. A., and Sassi, A. (2017). The contribution of information technology to the development of sports administration management. *Journal of Sciences and Techniques of Physical and Sports Activities*, *6(2).* Retrieved November 7, 2025, from https://www.asjp.cerist.dz/en/article/32518
7. Cherner, T., and Curry, K. (2017). Enhancement or transformation? A case study of preservice teachers' use of instructional technology. *Contemporary Issues in Technology and Teacher Education, 17*(2). Retrieved February 12, 2026 from https://citejournal.org/volume-17/issue-2-17/current-practice/enhancement-or-transformation-a-case-study-of-preservice-teachers-use-of-instructional-technology
8. Fullan, M. (2016). *The new meaning of educational change* (5th ed.). Teachers College Press.
9. International Organization for Standardization. (2018). *Information security management systems (ISO/IEC 27001)*. ISO Standards
10. Islam, M. S., and Grönlund, Å. (2016). An international literature review of 1:1 computing in schools. *Journal of Educational Change, 17, 191–222*. Retrieved January 17, 2026, from https://doi.org/10.1007/s10833-016-9271-y
11. Kozma, R. B. (2011). *ICT, education transformation, and economic development: An analysis of the U.S. National Educational Technology Plan*. UNESCO Institute for Information Technologies in Education.
12. Mensel, K. (2023). *Activating the role of e-administration in Algeria: Towards the emergence of an e-administration law* (Doctoral dissertation, University of 08 May 1945 Guelma). Retrieved December 25, 2025, from https://dspace.univguelma.dz/xmlui/handle/123456789/14266
13. Ministry of National Education. (2018). *Decision No. 65 dated July 12, 2018, specifying the procedures for organizing and operating the educational community*. Official Bulletin of National Education, 599. Directorate for the Development of Pedagogical and Educational Resources. https://www.education.gov.dz/wpcontent/uploads/2019/06/boen-599.pdf

14. Morkeb, H. (2020). The inevitability of the transition from traditional management to electronic management. *Al-Bayan Journal for Legal and Political Studies, 5*(2), 90–140.
15. Qayyum, A. (2022). Assessing the digital transformation of education systems. *In Handbook of open, distance and digital education*. Springer. Retrieved December 23, 2025, from https://doi.org/10.1007/978-981-19-0351-9_14-1
16. Otovescu, A. (2023). *Șocul pandemiei de COVID-19 asupra studenților - The Shock of the COVID-19 Pandemic on Students*. Craiova: Sitech.
17. Rabie, N. (2019). The inevitability of digitization as a mechanism for implementing electronic administration in Algeria. *Professor Researcher Journal for Legal and* Political Studies, 6(2). Retrieved April 11, 2026 from https://www.asjp.cerist.dz/en/article/180561
18. Redecker, C. (2017). *European framework for the digital competence of educators: DigCompEdu*. Publications Office of the European Union. https://doi.org/10.2760/159770
19. Salam, M. T. (2009). *E-learning as an approach to developing education: Arab and international experiences*. Egyptian Library House for Publishing and Distribution.
20. Schmölz, A. (2018). Enabling co-creativity through digital storytelling in education. *Thinking Skills and Creativity, 28*, 1–13. Retrieved March 09, 2026 from https://doi.org/10.1016/j.tsc.2018.02.002
21. UNESCO. (2019). *ICT in education policy toolkit*. UNESCO Publishing. https://unesdoc.unesco.org/
22. Van Dijk, J. A. G. M. (2020). *The digital divide*. Polity Press.
23. World Bank. (2020). *Realizing the future of learning: From learning poverty to learning for everyone, everywhere*. World Bank Publications. https://www.worldbank.org/

# Layered Belonging: Ethnicity, Religion and the Construction of National Identity In Kosovo

**Camelia Cristina KOJQIQI**
PhD Student, University of Craiova (Romania)
Email: cckojqiqi@hotmail.com

**Abstract**: *This study investigates the complex construction of national identity in Kosovo, emphasizing its intersections with ethnicity, religion, and socio-political dynamics. Drawing on data from a pilot survey conducted among ethnic Albanian Kosovars, the research explores how individuals articulate their national belonging within a post-conflict, multi-ethnic context. The findings reveal that national identity in Kosovo is predominantly shaped by ethnic and linguistic markers, while religious affiliation plays a secondary role. Respondents demonstrated layered and overlapping identities, frequently identifying simultaneously as Albanian, Kosovar, Muslim, and globally oriented. These results challenge static conceptions of identity and underscore the fluid, context-dependent nature of belonging in contemporary Kosovo. The study is grounded in a multidisciplinary theoretical framework, incorporating ethnosymbolism, imagined communities, boundary-making theory, and the concept of overlapping identities. It contributes to the scholarly discourse on identity formation in transitional societies and highlights the need for inclusive, pluralistic narratives and civic governance in Kosovo's nation-building process.*

***Keywords:*** *national identity; Kosovo; ethnicity; religion; post-conflict societies*

## 1. Introduction

The construction of national identity in Kosovo is an intricate and everchanging phenomenon, shaped by historical narratives, socio-cultural influences and political evolutions (Eriksen, 2010). The process of identity formation has been coerced by the remnants of the Yugoslav era, the Kosovo War, and the country's post-independence state-building struggles (Visoka and Gjevori, 2013). Although Kosovo proclaimed independence in 2008, its nation-building course remains challenged both internally and externally, influencing how citizens negotiate and define their national identity (Krasniqi, 2012).

A fundamental facet of Kosovo's national identity formation resides in its diverse demographic structure. The country's population is largely Albanian, with Serbian, Bosniak, Turkish, and Roma communities, each preserving well-defined and divergent cultural traditions along with historical experiences (Kosovo Agency of Statistics, 2014). Moreover, religion performs a nuanced part in modelling identity, with Islam being the foremost faith among ethnic Albanians and Christianity being prevalent among Serbs and other minorities (Demiri, 2020). Incongruent other nation-states where religion is a fundamental pillar of national identity, Kosovo's national identity is in essence entrenched in ethnic and linguistic ties rather than religious affiliation (Krasniqi, 2018; Ramadani, 2016).

Likewise, external influences, as well as international intercessions and efforts towards European integration, persevere to define Kosovo's national identity discourse (Krasniqi, 2012; Visoka, 2011). The bearing of international organizations such as the European Union (EU) and the United Nations (UN) plays a part in nurturing a civic-focused identity, highlighting multiculturalism, democratic governance, and human rights (Visoka and Doyle, 2016). Nevertheless, discords persevere concerning

the balance between civic nationalism and ethnic nationalism, especially in educational and political domains (Elbasani and Pici, 2017).

In a democratic state, the protection of minority rights is a fundamental principle of equality, pluralism, and social cohesion. Ethnic, linguistic, religious, and cultural minorities must be guaranteed the right to preserve their identity, use their language, access education, and participate fully in public life without discrimination. Respect for these rights is therefore an essential indicator of the democratic character and institutional maturity of a state (Otovescu, 2003).

This study investigates these dynamics by exploring how Kosovars convey and negotiate their national identity in relation to ethnicity, religion, and socio-political structures. By employing a pilot survey, this research endeavors to reveal key patterns and insights that partake to the growing discourse on national identity in post-conflict societies.

## 2. Background

Kosovo's national identity must be understood through the lens of its complex historical trajectory, marked by centuries of foreign domination, conflict, and evolving political structures. Under Ottoman rule (15th–20th centuries), Kosovo existed as a pluralistic society with overlapping religious and ethnic identities (Malcolm, 1998). The Ottoman period institutionalized communal autonomy through the millet system, allowing religious communities to maintain distinct identities within a broader imperial framework (Malcolm, 1998).

The 20th century initiated profound changes in Kosovo, starting with its integration into the Kingdom of Yugoslavia and later into Socialist Yugoslavia. During this period, the construction of identity was shaped by centralized governance, socialist ideology, and the promotion of a Yugoslav supra-identity that often masked and suppressed underlying ethnic tensions (Judah, 2008; Bieber, 2002). For Kosovo Albanians, these conditions fostered a sense of political and cultural marginalization, ultimately contributing to the emergence of a stronger national consciousness and resistance movements.

The collapse of Yugoslavia in the 1990s triggered violent upheaval in Kosovo. Widespread repression, ethnic discrimination, and the Kosovo War (1998–1999) deepened identity polarization and led to the intervention of NATO forces. The post-war period under United Nations administration aimed to rebuild institutions and foster interethnic coexistence, however the foundational issues of sovereignty, representation, and belonging remained unresolved (Caplan, 2005; Independent International Commission on Kosovo, 2000).

Kosovo's declaration of independence in 2008 represented a symbolic and legal milestone toward self-determination, and yet, the formation of national identity remains deeply contested. For many ethnic Albanians, the Kosovar identity is intertwined with Albanian cultural and historical narratives, highlighting continuity rather than a discontinuity from broader Albanian nationalism (Judah, 2008). In contrast, Kosovo Serbs largely reject the newly formed Kosovar state and maintain allegiance to Serbia, reinforcing parallel societal structures and diverging national affiliations (Krasniqi, 2012; Tadić, 2013). These tensions manifest not only in political representation and administrative division, but also in symbolic practices, language

use, and public education (Visoka, 2011). The presence of Serb-majority municipalities with continued institutional ties to Belgrade complicates the consolidation of a unified national identity. At the same time, reliance on international oversight has generated ambivalence regarding the legitimacy and authenticity of the Kosovar state, disseminating both dependence and resistance within the society (Perritt, 2010; Visoka, 2011).

National identity in Kosovo is best understood as a contested and layered construct, influenced by historical legacies, ethnic affiliations, religious pluralism, and external interventions. The persistence of competing narratives—between ethnic nationalism and civic inclusion, between local agency and international governance—reveals the ongoing struggle to define what it means to be Kosovar in the twenty-first century.

The present research focuses on the perspectives of ethnic Albanian Kosovars, who constitute the demographic majority and are central to the project of nation-building. It investigates how they perceive and prioritize the different elements of identity—ethnicity, language, religion, civic membership, and global belonging—within a context shaped by post-war recovery, regional instability, and aspirations for European integration. By examining these identity articulations, the research contributes to a deeper understanding of how national identity is formed, challenged, and potentially transformed in post-conflict Kosovo.

## 3. Theoretical Framework

This study draws upon a multidisciplinary body of theoretical work to conceptualize the intricate processes of national identity formation in Kosovo. The framework encompasses classical theories of nationalism and identity (Anderson, 1983; Gellner, 1983; Hobsbawm, 1992) along with contemporary insights on identity fluidity and pluralism (Brubaker and Cooper, 2000). At the core lies Anthony D. Smith's ethnosymbolism, which posits that national identities are historically rooted in myths, memories, values, and cultural symbols (Smith, 1991). In Kosovo, these foundational narratives are highly distinct in the emphasis on Albanian linguistic continuity, collective memory of resistance, and the symbolic importance of cultural heritage in the assertion of ethnic identity.

Expanding on this historical perspective, Benedict Anderson's theory of "imagined communities" posits the nation as a socially constructed entity, imagined by those who perceive themselves as part of a shared community (Anderson, 1983). In Kosovo, this imagined community can be seen in competing visions: a broader pan-Albanian ethno-nationalist narrative on one hand, and a civic Kosovar identity endorsed through state institutions and international support on the other. The attempt to foster a shared Kosovar identity, despite linguistic and religious heterogeneity, aligns with Anderson's notion of collective imagining through media, education, and symbolic governance.

Rogers Brubaker's appraisal of ethnic essentialism, especially his concept of "ethnicity without groups," challenges the static categorization of identity and instead frames it as contingent, performative, and situational (Brubaker, 2004). This perspective is particularly pertinent to Kosovo, where citizens commonly navigate between ethnic (Albanian), national (Kosovar), religious (Muslim or Christian), and

supranational (European or global) affiliations. Brubaker's viewpoint helps deconstruct identity as a static attribute and reconceptualize it as a repertoire of multiple, context-dependent identifications.

This fluid interpretation of identity is further advanced through Andreas Wimmer's "boundary-making" theory, which underlines how political actors construct social boundaries to determine group membership and inclusion (Wimmer, 2008). In Kosovo, boundary construction is attained at multiple levels: through state-driven definitions of citizenship and civic participation, the self-identification practices of ethnic communities, and the interventions of international organizations that mediate and shape identity frameworks (Wimmer, 2008). The parallel existence of Serb-majority municipalities with their own administrative ties to Serbia shows how boundary-making can reinforce fragmentation as well as resistance to a singular national narrative.

Florian Bieber's work on post-conflict identity formation appends another significant layer, highlighting how international interventions and peacebuilding models molds identity narratives (Bieber, 2015). In the Kosovar context, the advancement of civic multiculturalism and inclusive governance by actors like the EU and UN cohabits with enduring ethnonationalist sentiments. Bieber's analysis is crucial in analyzing how externally-imposed civic identity models often clash with internal identity preferences, which are shaped by historical grievances, communal solidarity and contested notions of belonging.

The addition of overlapping identities theory further enhances the analytical lens. Scholars such as Steven Vertovec (2001) and Nira Yuval-Davis (1997) claim that identity is intrinsically multidimensional and intersectional. People construct their self-understanding through multiple, overlapping attachments—ethnic, national, religious, gendered, and cosmopolitan. This theoretical perspective is fundamental to the current study's objectives and findings. In Kosovo, many individuals simultaneously identify as ethnically Albanian, nationally Kosovar, religiously Muslim or Christian, and ideologically European or globally oriented. These plural affiliations are not experienced as contradictions, but as layered components of a complex self-concept that varies by context (Yuval-Davis, 1997; Vertovec, 2001).

The theoretical frameworks outlined above directly inform the design and interpretation of this study. The survey was constructed to capture these different dimensions of identity—ethnic, linguistic, religious, civic, and global—and to examine how they are prioritized, negotiated, and articulated by ordinary citizens. The study does not aim to reduce identity to a singular definition but seeks instead to reveal the multiplicity of ways in which Kosovars relate to their nation, their ethnicity, their faith, and their broader geopolitical environment. By doing so, it offers not only an empirical insight into the construction of national identity in Kosovo, but also a theoretical contribution to the study of identity in post-conflict, multi-ethnic societies (Brubaker, 2004; Yuval-Davis, 1997; Wimmer, 2008).

A comparable situation can be observed among the Romanian communities in Ukraine, particularly in the regions of Chernivtsi, Transcarpathia, and Odesa. Representatives of these communities have repeatedly expressed concern that restrictions on Romanian-language education, the reduced institutional use of the Romanian language, and the reorganization of minority schools may constitute

discriminatory practices and encourage gradual linguistic and cultural assimilation (Otovescu, Cioacă and Păsătoiu, 2020; Otovescu and Cioacă, 2023). These developments may weaken the transmission of Romanian identity to younger generations and illustrate how educational and administrative policies can become instruments for redefining minority identities within the broader nation-building process.

## 4. Objectives of the Study

This study objectives are to identify preliminary patterns in how Kosovars define their national identity concerning ethnicity, language, religion, and governance. Furthermore, it will provide insights into how demographic factors (age, gender, location, education) influence national identity perception. This information will help to inform the design of a larger, more comprehensive study and contribute to a deeper understanding of the factors shaping national identity in Kosovo today.

## 5. Methodology

A convenience sample of 33 ethnic Albanian Kosovars was selected, ensuring representation across urban (78.8%) and rural (21.2%) contexts. The sampling criteria was based on the participants' ethnic Albanian background and their age (18 and older).

This study employed a mixed-methods design, emphasizing quantitative survey. Surveys were administered electronically via Google Forms over one week. Participants were informed of the study's academic purpose, anonymity, and voluntary participation. No personal identifiers were collected, adhering to ethical research standards.

In the survey instrument, questions were organized into distinct thematic areas designed to capture a comprehensive picture of national identity formation. Questions employed Likert-type scales, closed-ended response options, and multiple-choice formats to allow for statistical analysis while ensuring conceptual clarity. The first section addressed key demographic variables, including age, gender, ethnicity, educational background, and employment status, to contextualize identity perceptions across different social groups. The second section explored dimensions of national identity, focusing on emotional attachment to Kosovo, identification with Europe, and the specific factors respondents consider fundamental to being Kosovar. The third section concentrated on religious beliefs and practices, probing the perceived role of religion in shaping national identity and attitudes toward the integration of religion into public and political life. Lastly, the survey investigated socio-political views, including expressions of national pride, perceptions of the influence of international organizations, and attitudes toward globalization. This structure allowed for a nuanced analysis of how various identity dimensions intersect and influence one another in contemporary Kosovo.

Data was analyzed with SPSS statistical program (Statistical Package for the Social Sciences, SPSS Inc., Chicago, Illinois), employing descriptive statistics to report frequencies and percentages for each survey item. Cross-tabulation was used to examine the relationships between demographic variables and responses to key survey questions and results were expressed by Pearson Chi Square measure of association.

## 6. Results and Discussion

The findings of this pilot study reveal that demographic factors—particularly age, gender, location, and education—play a significant role in shaping perceptions of national identity in Kosovo. Younger respondents (18–30 years old) demonstrated a stronger inclination toward civic and global identities, with a majority expressing a sense of global citizenship and openness to inclusive definitions of being Kosovar. In contrast, older participants (51–70 years old) were more likely to emphasize ethnic identity, particularly Albanian heritage, and to associate national belonging with traditional values ($\chi^2(2, N = 33) = 4.372$, $p = 0.012$). Gender differences were more nuanced but still notable: women showed slightly stronger emotional attachment to local and national spaces and were more likely to express dual identities (e.g., Kosovar-Albanian), whereas men more frequently identified exclusively with Albanian ethnicity ($\chi^2(2, N = 33) = 2.305$, $p = 0.016$). Urban respondents, who comprised the majority of the sample (78.8%), tended to embrace civic and secular understandings of identity, exhibiting greater openness to interfaith relationships and minority rights ($\chi^2(2, N = 33) = 5.121$, $p = 0.024$). In contrast, rural participants placed greater importance on shared customs and religious affiliation as components of national identity. Educational attainment emerged as a strong differentiator: respondents with higher education levels were more likely to adopt civic and pluralistic views of identity, showing less emphasis on religion and ancestry as defining features of being Kosovar ($\chi^2(2, N = 33) = 6.742$, $p = 0.034$). Those with lower levels of education, however, tended to link national identity more closely with religion, traditional norms, and ethnic lineage. Overall, these results underscore the layered and context-dependent nature of national identity in Kosovo, shaped significantly by individual demographic characteristics.

These trends confirm the context-dependent, layered, and dynamic nature of identity construction in post-conflict Kosovo. Language is widely regarded as a core component of national identity, especially among females, educated respondents, and urban dwellers (Gender and language importance: $\chi^2(2, N = 33) = 4.212$, $p = 0.040$; Education and language importance: $\chi^2(2, N = 33) = 4.981$, $p = 0.083$). Older individuals place slightly less emphasis on it (Age and language importance: $\chi^2(2, N = 33) = 3.772$, $p = 0.152$). Birthplace as a defining marker is more important to rural and less-educated individuals, reflecting traditional or ancestry-based views. Citizenship is embraced as a civic marker by younger and university-educated respondents, but is less emphasized by rural residents. Religion is considered secondary across all groups, though rural and older participants value it slightly more. Educated and female respondents support secular definitions. Regarding ethnic versus civic identity, men and older participants lean toward exclusive ethnic identification (e.g., Albanian), while younger, urban, and female respondents frequently express dual or civic identities.

The results further demonstrate that national identity in Kosovo is influenced primarily by ethnic and linguistic factors rather than religious affiliation. A majority of respondents (66.7%) feel “very close” to Kosovo, while only 36.4% feel similarly toward Europe, indicating a stronger identification with the national rather than supranational identity. The role of citizenship is contested with 45.5% considering that is very important, while 42.4% regard it as not important. This ambivalence reflects

the ongoing tensions between ethnic and civic conceptions of nationhood. In contexts like Kosovo, where citizenship often overlaps but does not fully substitute for ethnic belonging, these findings confirm that formal legal membership is not yet the primary basis for national identity for large segments of the population.

Language stands out as a key marker of national identity, with 57.6% of respondents viewing the ability to speak Albanian as crucial to being Kosovar. These affirms previous research (Kellas, 1998; Smith, 1991) suggesting that linguistic homogeneity often serves as a proxy for national belonging, particularly in ethnonational contexts.

**Table 1. Importance of Selected National Identity Factors**

| National Identity Factor | Very Important (%) | Fairly Important (%) | Not Important (%) |
|---|---|---|---|
| Citizenship | 45.5 | 9.1 | 42.4 |
| Speaking Albanian | 57.6 | 21.2 | 18.2 |
| Being Muslim | 18.2 | 18.2 | 54.6 |

*Source: Data collected by the author through the pilot survey.*

Despite Kosovo's predominantly Muslim population (87.9%), religion appears to play a secondary role in the construction of national identity with 54.6% stating that being Muslim is not essential for national identity. Only 36.4% of respondents believe that religion is essential to national belonging. This trend reinforces arguments made by Bringa (1995) and Bieber (2015) that in multi-ethnic Balkan societies, ethnic narratives override religious ones in shaping national affiliation. Even among Muslim respondents, ethnic and civic identities frequently take precedence over religious identity when it comes to national self-definition, suggesting a modern, secular conception of nationality, wherein religion remains a significant private or communal affiliation but is not politicized or institutionalized within national identity.

Furthermore, the findings highlight that national identity in Kosovo is characterized by overlapping, layered, and fluid identifications rather than by rigid, exclusive categories. Respondents frequently negotiate between multiple dimensions of belonging — ethnic, national, religious, and even global — highlighting the complexity of identity formation in post-conflict, multi-ethnic societies.

A significant portion of participants identify primarily as Albanian (45.5%), while others prioritize being Kosovar (24.2%) or express dual affiliations, identifying as Kosovar first, then Albanian (18.2%) or vice versa (12.1%). This pattern indicates that while the ethnic Albanian heritage remains a strong foundation of identity, a distinct Kosovar national consciousness is emerging alongside it. Rather than replacing ethnic identity, the Kosovar identity seems to supplement and coexist with it, illustrating a phenomenon of nested identities where ethnic and national belongings are not mutually exclusive.

Although the majority of respondents identify as Muslim (87.9%), religious affiliation does not appear to override national attachment. Indeed, when asked to prioritize between religious and national identities, many participants positioned their ethnic or national identity above religious belonging: 42.4% identified as Albanian first, then Muslim, while 15.2% identified as Kosovar first, then Muslim ($\chi^2(2, N = 33) = 6.742$, $p = 0.034$). This suggests that, although religion remains an important element of personal and communal identity, it is secondary to ethnic and national affiliations in the construction of a Kosovar sense of self.

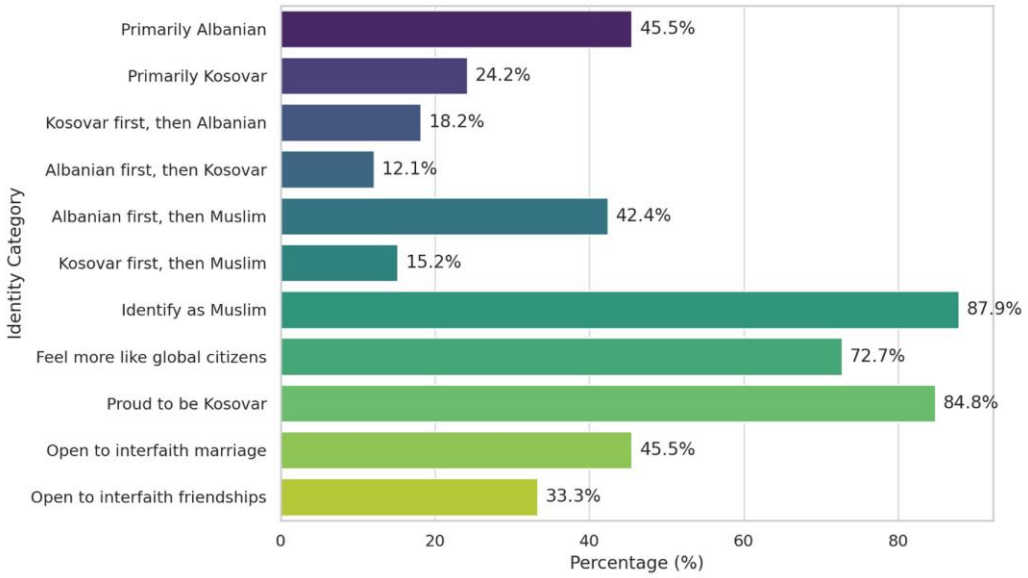
This layered identity model is further supported by 72.7% of respondents who report feeling more like citizens of the world than of any single country, indicating strong cosmopolitan orientations. However, this does not preclude national pride as 84.8% expressed pride in being Kosovar, while the majority emphasized the significance of Albanian customs and traditions. Such findings illustrate that global, national, ethnic, and religious identities are not perceived as contradictory, but are rather combined flexibly depending on context and personal experience.

Social attitudes further support the notion of fluid, inclusive identity perceptions. A large proportion of respondents (45.5%) indicated openness to interfaith marriage, and 33.3% were willing to have close friendships across religious lines. This openness indicates that, despite the importance of ethnic and religious markers, interpersonal relations are governed more by civic and social trust than by rigid identity boundaries.

Taken together, these findings challenge traditional notions of identity as singular or fixed. Instead, they support the view that in Kosovo, identity is plural, dynamic, and contextually negotiated. Kosovars appear to draw simultaneously on ethnic heritage, national affiliation, religious background, and global citizenship, constructing hybrid and situational identities. Such fluidity reflects broader trends in post-conflict societies, where overlapping affiliations can serve both as sources of tension and as opportunities for inclusive nation-building. From a theoretical perspective, these results align with Brubaker's (2011) notion of "ethnicity without groups", where ethnic, national, and religious identifications are invoked flexibly rather than as fixed categories. They also resonate with Eriksen's (2010) emphasis on the "experiential world" in understanding identity — highlighting that individuals experience and negotiate identity boundaries differently depending on political, social, and personal circumstances.

In the context of Kosovo's state-building process, recognizing and embracing these overlapping identities is essential. Efforts to promote a singular, rigid national identity may risk alienating citizens who experience their belonging in multi-layered ways. Instead, policies that acknowledge the plural and dynamic nature of identity — fostering pride in both Kosovar statehood and Albanian heritage, and recognizing religious and global affiliations — may be more effective in achieving long-term national cohesion.

**Figure 1. Identity and Social Attitudes in Kosovo**




*Source: Data collected by the author through the pilot survey.*

## 7. Conclusion

This study contributes to the growing body of literature on national identity formation in post-conflict and multi-ethnic societies by offering empirical insights into the evolving identity dynamics in Kosovo. Through the analysis of pilot survey data, the research demonstrates that ethnic and linguistic affiliations remain the dominant foundations of national identity among ethnic Albanian Kosovars, while religious identification, although significant at a personal level, is secondary in shaping collective belonging.

The findings indicate a pronounced tendency toward layered and overlapping identities, wherein individuals simultaneously identify along ethnic, national, religious, and global lines. Such fluid and situational forms of identity challenge rigid, binary models of nationhood and highlight the importance of context in identity negotiation. In particular, the emergence of a distinct Kosovar identity does not displace ethnic Albanian identification but rather coexists with it, forming a nested identity structure reflective of Kosovo's socio-political complexity.

Future research should build on this pilot study by employing larger, representative samples and incorporating qualitative methodologies to capture the lived experiences and narrative dimensions of identity. Longitudinal designs may further illuminate how identity configurations evolve over time in response to shifting political, social, and generational factors.

**References:**


1. Anderson, B. (1983). *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. Verso.
2. Bieber, F. (2002). Nationalism in the absence of a nation: The politics of Albanian identity in post-war Kosovo. *Nationalities Papers*, 28(1), 23–49.
3. Bieber, F. (2015). *The Western Balkans: Between stabilization and Europeanization*. Routledge.
4. Bringa, T. (1995). *Being Muslim the Bosnian Way: Identity and Community in a Central Bosnian Village*. Princeton University Press.
5. Brubaker, R. (2004). *Ethnicity without Groups*. Harvard University Press.
6. Brubaker, R., and Cooper, F. (2000). Beyond "identity". *Theory and Society*, 29(1), 1–47. https://doi.org/10.1023/A:1007068714468
7. Brubaker, R. (2011). Nationalizing states revisited: Projects and processes of nationalization in post-Soviet states. *Ethnic and Racial Studies*, 34(11), 1785–1810. https://doi.org/10.1080/01419870.2011.579137
8. Caplan, R. (2005). *International Governance of War-Torn Territories: Rule and Reconstruction*. Oxford University Press.
9. Demiri, Q. (2020). Religion and identity in Kosovo: A sociological analysis. *Kosovo Sociological Review*, 15(1), 45–67.
10. Elbasani, A., and Pici, F. (2017). European integration and state-building in the Western Balkans: Europeanization or business as usual? In Elbasani, A. (Ed.), *European Integration and Transformation in the Western Balkans*. Routledge.
11. Eriksen, T. H. (2010). *Ethnicity and Nationalism: Anthropological Perspectives* (3rd ed.). Pluto Press.
12. Gellner, E. (1983). *Nations and Nationalism*. Cornell University Press.
13. Hobsbawm, E. (1992). *Nations and Nationalism Since 1780: Programme, Myth, Reality* (2nd ed.). Cambridge University Press.
14. Independent International Commission on Kosovo. (2000). *The Kosovo Report: Conflict, International Response, Lessons Learned*. Oxford University Press.
15. Judah, T. (2008). *Kosovo: What Everyone Needs to Know*. Oxford University Press.
16. Kellas, J. G. (1998). *The Politics of Nationalism and Ethnicity*. Palgrave Macmillan.
17. Kosovo Agency of Statistics. (2014). *Statistical Yearbook of the Republic of Kosovo 2014*. Pristina: KAS.
18. Krasniqi, G. (2012). Citizenship in an ethnically divided society: The case of post-conflict Kosovo. *Nationalities Papers*, 40(3), 467–488.
19. Krasniqi, G. (2018). The right to have rights: Citizenship in Kosovo. In Shaw, J., and Štiks, I. (Eds.), *Citizenship after Yugoslavia*. Routledge.
20. Malcolm, N. (1998). *Kosovo: A Short History*. Macmillan.
21. Otovescu, A., and Cioacă, V. O. (2023). *Comunitatea românilor din Cernăuți-Ucraina: origine etnică și discriminare politică - The Community of Romanians from Chernivtsi–Ukraine: Ethnic Origin and Political Discrimination*. 2nd revised and enlarged ed. Craiova: Sitech.

22. Otovescu, A., Cioacă, V. O., and Păsătoiu, F. (2020). The Romanian Community in Chernivtsi: Historical Landmarks and Current Issues. *Revista Universitară de Sociologie*, XVI(1), 190–201.
23. Otovescu, C., and Lepadatu, D. (2009). The Human Rights and Roma Minority in European Union: A Socio-Legal Analysis of Discrimination Cases from Romania. *International Journal of Interdisciplinary Social Sciences*, 4(7), 159–170.
24. Perritt, H. H. (2010). *The Road to Independence for Kosovo: A Chronicle of the Ahtisaari Plan*. Cambridge University Press.
25. Ramadani, V. (2016). National identity in Kosovo: A sociological perspective. *Journal of Balkan Social Science*, 12(2), 88–104.
26. Smith, A. D. (1991). *National Identity*. University of Nevada Press.
27. Tadić, B. (2013). The position of Serbs in Kosovo: A case study. *Southeast European and Black Sea Studies*, 13(1), 79–95.
28. Vertovec, S. (2001). Transnationalism and identity. *Journal of Ethnic and Migration Studies*, 27(4), 573–582.
29. Visoka, G. (2011). International governance and local resistance in Kosovo: The thin line between ethical, emancipatory and exclusionary politics. *Irish Studies in International Affairs*, 22, 99–125.
30. Visoka, G., and Doyle, J. (2016). Neo-functional peace: The European Union way of resolving conflicts. *Journal of Common Market Studies*, 54(4), 862–877.
31. Visoka, G., and Gjevori, E. (2013). Regime legitimacy and the post-independence crisis in Kosovo. *Contemporary Politics*, 19(2), 187–202.
32. Wimmer, A. (2008). The making and unmaking of ethnic boundaries: A multilevel process theory. *American Journal of Sociology*, 113(4), 970–1022.
33. Yuval-Davis, N. (1997). *Gender and Nation*. Sage.

# The Experience of Meaning in Life and Life Satisfaction: The Mediating Role of Positive Affect and Hope

**Florena ANTONESCU**
Teaching Assistant, PhD Candidate, Ovidius University, Constanţa (Romania)
Email: florena.antonescu@yahoo.com

***Abstract*****:** *The present study examined the relationship between the experience of meaning in life and life satisfaction, with particular attention to the mediating roles of positive affect, optimism, and hope. Grounded in the broaden-and-build theory of positive emotions, the study tested whether affective and motivational resources explain the association between perceived meaning and global life evaluation. The sample consisted of 196 adults aged between 18 and 70 years, who completed self-report measures assessing life satisfaction, positive affect, optimism, hope, and the experience of meaning in life. Pearson correlations and multiple mediation analysis were conducted using PROCESS Model 4 with 5,000 bootstrap samples. The results showed significant positive associations among all investigated variables. The experience of meaning in life was positively correlated with life satisfaction, positive affect, optimism, and hope. The mediation model was significant and explained 48% of the variance in life satisfaction. Positive affect and hope significantly mediated the relationship between the experience of meaning in life and life satisfaction, whereas optimism did not emerge as a significant mediator. These findings suggest that the experience of meaning in life contributes to life satisfaction both directly and indirectly, particularly through positive emotional states and hopeful goal-directed thinking. The results highlight the relevance of meaning, positive affect, and hope as psychological resources associated with subjective well-being.*

***Keywords:*** *experience of meaning in life; life satisfaction; positive affect; hope; optimism*

## 1. Introduction

Existing research consistently shows a positive association between meaning in life and life satisfaction, yet the mechanisms underlying this relationship remain insufficiently explored. For instance, Sameer, Eid, and Veenhoven (2023) show that individuals who report a higher perception of meaning tend to display greater satisfaction with their own existence, confirming the robustness of this link at the individual level. At the same time, Steger and Kashdan (2007) showed that perceived meaning in life and life satisfaction correlate positively over time, suggesting that the two constructs reinforce one another. However, the literature indicates that the explanatory process remains incomplete, particularly regarding the role of psychological resources such as positive affect, optimism, and hope (Ho, Cheung and Cheung, 2010; Krok and Telka, 2019). Within this context, the aim of the present study is to test the relationship between the experience of meaning in life and life satisfaction and to investigate the mediating role of these resources in this relationship. The relationships investigated are expected on the basis of the broaden-and-build theory (Fredrickson, 2001), according to which positive emotions (e.g., joy, interest, gratitude) broaden the repertoire of thought and action and facilitate the building of durable personal resources (psychological, social, cognitive, and even physical). From this perspective, a more pronounced experience of meaning in life, through the integration of meaning, coherence, and direction in life, tends to generate positive affective states more frequently. These, in turn, broaden cognitive and behavioral

flexibility and favor the accumulation of resources such as optimism (positive general expectancies) and hope (goal-directed expectancies and multiple pathways for attaining goals), which leads to higher levels of life satisfaction (Fredrickson, 2001).

This endeavor carries both theoretical and practical implications. From a theoretical standpoint, the study contributes to understanding how the experience of meaning in life, through explanatory resources such as positive affect, optimism, and hope, leads to life satisfaction. For example, the literature shows that optimism partially mediates the link between meaning in life and psychological well-being (Ho et al., 2010), and that hope and meaning in life can mutually reinforce one another (Feldman and Snyder, 2005; Edwards et al., 2025). These findings validate the concept of the experience of meaning in life through its predictive value for life satisfaction. The study extends the application of the broaden-and-build theory to the experience of meaning in life, exploring the idea that meaning in life can represent a starting point for re-experiencing positive emotions that lead to greater life satisfaction. From a practical perspective, the results highlight the importance of cultivating the experience of meaning in life in psychological and educational interventions, since the development of meaning, optimism, and hope can function as a support for a more satisfying life.

Life satisfaction is widely regarded as a central subjective component of quality of life, as it reflects individuals' overall cognitive evaluation of their living conditions and personal circumstances (Otovescu, 2026). While quality of life also includes objective dimensions such as health, income, education, and social relationships, life satisfaction captures how these conditions are perceived and integrated into a general judgment of one's life. Therefore, higher life satisfaction indicates not only greater subjective well-being, but also a more favorable overall assessment of quality of life.

## 2. Literature Review and Hypotheses

### 2.1. The Experience of Meaning in Life and Positive Affect, Optimism, and Hope

A number of studies have highlighted a positive association between meaning in life and positive affect, among both younger and older individuals, in healthy persons and those suffering from various illnesses, and across individuals from different cultures. Miao, Zheng, and Gan (2017) investigated the link between meaning in life and positive affect using a 21-day daily diary design. The results showed that the perceived level of life meaning predicted the daily experience of positive affect, suggesting that meaning in life represents an important psychological resource for cultivating positive emotional states and sustaining subjective well-being. Hicks and colleagues (2012) showed that a positive relationship exists between positive affect and meaning in life among younger, middle-aged, and older adults alike. However, this relationship becomes stronger with advancing age or when participants perceive that they have less time remaining to achieve their goals. Among younger individuals, meaning in life and positive affect correlate, but the emphasis falls on long-term goals, whereas among older individuals, day-to-day positive affect (such as joy and calm) is more strongly integrated into the experience of meaning. These findings suggest that, across the lifespan, the relationship between meaning and positive emotions is present at all ages but acquires greater intensity and significance with the perception of diminishing time.

The study conducted by Éva Kállay (2008) analyzed a sample of female cancer patients, investigating the role of meaning in life, positive affect, and religious growth. The results showed that meaning in life correlates positively with positive affect. Thus, women who manage to find meaning in their own existence tend to display more positive emotions, which contributes to better psychological adjustment in the face of illness. The central conclusion is that positive affect and meaning in life reinforce one another, both constituting essential resources for maintaining emotional balance under conditions of severe stress. Pan, Wong, Chan, and Joubert (2008) examined 627 Chinese students: 400 enrolled at universities in Hong Kong and 227 at the University of Melbourne, in order to analyze the role of meaning in life and acculturative stress on positive affect. The results showed that meaning in life is positively associated with positive affect in both samples, with a stronger contribution than acculturative stress. Moreover, in both cultural contexts, meaning in life reduced the negative impact of acculturative stress on emotional state, functioning as a protective factor. The similarities between the Australian and Hong Kong samples confirm the relatively universal character of the relationship between meaning and positive affect.

From the perspective of the broaden-and-build theory (Fredrickson, 2001), these results can be explained by the fact that positive emotions broaden the scope of attention and cognitive flexibility, favoring the exploration of new perspectives and the generation of adaptive strategies. Over time, this process leads to the building of durable psychological resources, such as resilience and the capacity to integrate difficult experiences. Thus, when meaning in life is associated with the experience of positive affect, individuals not only benefit from a better immediate emotional state but also consolidate the personal resources that help them cope with stress, illness, or cultural transitions. Consequently, the relationship between meaning and positive affect can be understood as a virtuous circle: meaning in life increases the likelihood of positive emotions arising, and these, through the mechanisms described by Fredrickson, further strengthen the perception of personal meaning and the capacity for long-term adaptation. This dynamic is also relevant to loneliness, as a stronger sense of meaning and more frequent positive emotions may encourage social engagement and reduce feelings of isolation (Cioacă, ). Conversely, persistent loneliness can weaken positive affect and diminish the perceived coherence and significance of life, thereby undermining long-term adaptation and well-being.

***Hypothesis 1. There is a positive association between the experience of meaning in life and positive affect.***

Research indicates that individuals who report high meaning in life also tend to display higher levels of optimism (Ho et al., 2010; Krok and Telka, 2019). For example, in a study on adolescents, meaning in life showed a significant positive correlation with optimism ($r \approx .40$), suggesting that those who perceive their life as having significance hold more favorable expectations about the future (Krok and Telka, 2019). One explanation is that when individuals feel that their life has meaning, they set goals and values aligned with their own beliefs (self-concordant), which provides them with a sense of direction and control and fuels optimistic expectations of success (Krok and Telka, 2019). In addition, meaning in life offers a cognitive framework that helps people interpret events in a more positive light and maintain optimism even in the face of adversity. Some studies suggest that meaning in life acts as a protective

factor against stress, contributing to a more optimistic outlook and to the reduction of negative emotions (Brassai et al., 2011).

Ho, Cheung, and Cheung (2010) found in a sample of adolescents that meaning in life is positively associated with optimism and that, furthermore, optimism partially mediates the link between meaning and psychological well-being (e.g., higher levels of life satisfaction and positive affect). Similarly, a more recent study on European adolescents showed that a stronger sense of meaning in life predicts higher levels of optimism, which subsequently contributes to increased well-being (Krok and Telka, 2019). Interestingly, the relationship may also be bidirectional: among older adults, optimism has been observed to contribute to well-being also by helping individuals maintain their sense of meaning in life; in this context, optimism has positive effects on the perception of meaning, which in turn improves life satisfaction and well-being (Ju et al., 2013). These findings underscore the close relationship and the potentially circular mechanisms between meaning in life and optimism: finding significance in life experiences can generate an optimistic attitude, while an optimistic outlook can, in turn, support the feeling that life has meaning.

From the perspective of the broaden-and-build theory (Fredrickson, 2001), optimism can be understood as an outcome of the positive emotions cultivated through meaning. When people live with the feeling that their life has significance, this activates positive affect (such as confidence or joy), which broadens the repertoire of thoughts and behaviors. Through this mechanism, individuals become more cognitively flexible, more open to opportunities, and better able to anticipate favorable outcomes, which is reflected in higher levels of optimism. In the long term, the positive emotions resulting from the experience of meaning build stable psychological resources, including the capacity to maintain confidence in the future even under conditions of stress. Thus, Fredrickson's theory explains how meaning in life not only correlates with optimism but also creates the conditions for a cycle of mutual reinforcement, in which optimism and meaning sustain and consolidate one another across the lifespan.

***Hypothesis 2. There is a positive association between the experience of meaning in life and optimism.***

Numerous studies have identified a close relationship between the perceived meaning of life and an individual's level of hope. For example, Feldman and Snyder (2005) found a strongly positive correlation ($r \approx .70$) between meaning in life and hope, suggesting substantial overlap between these constructs. Both hope and meaning are associated with indicators of well-being: individuals with high levels on these dimensions tend to report greater life satisfaction and higher eudaimonic well-being. In the specialized literature, meaning in life is considered a key component of mental health and well-being, while hope is described as an important protective factor (Karataş et al., 2021). Thus, numerous studies show strong positive links between hope and meaning in life, including consistent cross-sectional and longitudinal findings (Feldman and Snyder, 2005; Mascaro and Rosen, 2005). Moreover, the simultaneous presence of a pronounced sense of meaning in life and hope has been associated with enhanced psychological adjustment and resilience in the face of difficult events. In contexts of major stress (e.g., the COVID-19 pandemic), individuals who find significance in their lives and maintain hope display higher levels of life satisfaction and a better capacity to cope with adversity (Karataş et al., 2021).

The mechanisms underlying this relationship point to a reciprocal influence between meaning and hope. On the one hand, having a clear purpose and significance in life can fuel hope regarding the future. Meaning offers individuals a future-oriented perspective and a sense that it is worth pursuing long-term goals, which enhances goal-directed thinking. Longitudinal studies support this direction. Mascaro and Rosen (2005) showed that existential meaning predicts increases in hope over time; the initial level of meaning explained subsequent variation in hope (above and beyond the influence of initial hope and other personality traits) across a two-month interval. Similarly, Miao et al. (2021) showed, both experimentally and longitudinally, that an increase in meaning in life leads to an increase in hope, an effect mediated by future focus: in a study on adults, meaning measured at Time 1 predicted hope levels at Time 3 through an increase in focus on future goals at Time 2. On the other hand, hope can sustain meaning in life. Hope drives individuals to pursue their significant goals, thereby consolidating the feeling that life has purpose. According to some authors, hope is a central component of meaning in life (Feldman and Snyder, 2005) and directly contributes to the perception of a life full of significance. Very recent empirical evidence confirms this reverse link. For example, Edwards et al. (2025) conducted six studies (cross-sectional, daily, and longitudinal) that consistently showed that the feeling of hope fuels meaning in life; even after controlling for other positive emotions, hope proved to be the only positive emotion that predicted subsequent increases in perceived meaning in life. Therefore, meaning in life and hope can mutually reinforce each other, forming a virtuous circle: meaning provides reasons to hope, while hope motivates the pursuit of goals that confer meaning. This synergy explains why the concurrent presence of meaning and hope is associated with high psychological well-being, low levels of depression and anxiety, and a better capacity to overcome difficult periods (Feldman and Snyder, 2005; Mascaro and Rosen, 2005; Karataş et al., 2021).

From the perspective of the broaden-and-build theory (Fredrickson, 2001), this relationship between meaning and hope can be understood through the role of positive emotions. Hope is a future-oriented emotion that extends the cognitive and behavioral repertoire, stimulating planning, the exploration of alternatives, and the maintenance of motivation toward achieving goals. At the same time, the experience of clear meaning in life favors the experience of positive emotions (such as confidence and courage), which fuel hope and consolidate durable psychological resources. Thus, Fredrickson's theory explains how meaning generates positive emotions that enhance hope, while hope, by maintaining a future orientation, builds cognitive and motivational resources that strengthen perceived meaning. Through this mechanism, meaning and hope mutually reinforce one another in a virtuous circle of resilience, contributing to psychological well-being and to the capacity to effectively cope with difficult situations.

***Hypothesis 3. There is a positive association between the experience of meaning in life and hope.***

### 2.2. Positive Affect, Optimism, Hope, and Life Satisfaction

Although positive affect and life satisfaction represent distinct dimensions of well-being (emotional vs. cognitive), they are closely linked empirically. Studies show a moderate positive correlation between the frequency of positive emotions and overall life satisfaction—for example, approximately .40-.50 among students (Lucas et

al., 1996). In other words, individuals who frequently experience positive emotions tend to evaluate their own lives as more satisfying (Lyubomirsky et al., 2005). According to Fredrickson's (2001) broaden-and-build theory, positive emotions play an adaptive role: they broaden the repertoire of thought and action and, over time, facilitate the accumulation of durable personal resources (e.g., resilience, social relationships). These resources subsequently contribute to enhanced well-being and life satisfaction. According to this perspective, positive emotions, such as joy, gratitude, or interest, broaden the individual's repertoire of thought and action, facilitating creativity, cognitive flexibility, and exploration of the environment. In the long run, these emotions contribute to building psychological resources (resilience, optimism), social resources (supportive relationships), cognitive resources (problem-solving skills), and even physical resources (better health).

Thus, positive emotions play not only an immediate, hedonic role but also a functional, developmental one, increasing individuals' chances of coping with adversity and improving their life satisfaction (Fredrickson, 2001). Longitudinal evidence supports this explanation: in one study, the frequency of daily positive affect predicted subsequent increases in both psychological resilience and life satisfaction (Cohn et al., 2009). Moreover, increased resilience was found to mediate the link between positive emotions and life satisfaction, suggesting that people become more satisfied with their lives not only because they feel good but also because they develop resources that allow them to live more fully. Overall, the specialized literature points to a consistent relationship between positive affect and life satisfaction, the two influencing one another reciprocally: frequent positive affective experiences favor a life perceived as satisfying, and a positive outlook on one's own life (a high level of satisfaction) can, in turn, sustain the experience of positive emotions (Fredrickson, 2001; Lyubomirsky et al., 2005).

***Hypothesis 4. There is a positive association between positive affect and life satisfaction.***

The relationship between optimism and life satisfaction has attracted considerable interest in the specialized literature, with numerous studies indicating a robust positive link between them. For example, in a study conducted in Pakistan on a sample of adults, the level of optimism correlated positively with life satisfaction ($r \approx .50$; Ahmad and Vveinhardt, 2024). Similarly, meta-analytic findings have consistently shown that more optimistic individuals report higher levels of satisfaction and psychological well-being compared to pessimistic individuals (Alarcon et al., 2013). There is even large-scale evidence that optimistic individuals tend to be happier overall and to experience a higher quality of life than those with low optimism (Blasco-Belled et al., 2022; Trudel-Fitzgerald et al., 2019). The literature suggests several explanatory mechanisms for the association between optimism and life satisfaction. A first important mechanism concerns stress management: optimistic individuals approach stress and difficulties in a more adaptive manner. They are inclined to use active and constructive stress-management strategies, such as problem-solving, seeking social support, or positively reinterpreting situations, thereby reducing the negative impact of stressful events on their well-being. Studies have shown that optimism facilitates effective stress management, contributing to increased psychological well-being. For instance, Ginevra and colleagues (2017) found among adolescents that a high level of

optimism is associated with a more positive perception of one's own life, with these individuals coping better with difficult situations and being less vulnerable to stress.

Another mechanism through which optimism influences life satisfaction relates to reduced emotional reactivity to stress. Longitudinal research based on daily diaries indicates that individuals with high optimism experience fewer negative emotions in response to daily stressors compared to pessimistic individuals (Majeed et al., 2021). In other words, optimism functions as a protective factor against stress: optimistic individuals tend to make more positive cognitive appraisals of difficult events, for example, believing that their problems can be solved, thereby attenuating the emotional impact of such events. This greater emotional resilience prevents a decline in life satisfaction during periods of adversity. Additionally, the optimistic explanatory style (the tendency to attribute negative events to temporary and specific causes rather than global or personal ones) contributes to the maintenance of well-being, as has been observed even in challenging contexts such as the COVID-19 pandemic (Boyer et al., 2021; Garvin and Putri, 2021). By perceiving difficulties as transient and controllable, optimists protect their emotional balance and positive attitude.

In conclusion, the scientific literature provides consistent support for the close link between optimism and life satisfaction. The optimistic outlook on life is associated with higher levels of satisfaction, partly due to the psychological mechanisms it entails: effective stress-management strategies and attenuated emotional reactivity to stress. Empirical studies, ranging from correlational analyses and meta-analyses to longitudinal research, confirm that optimism represents an important factor associated with subjective well-being (Alarcon et al., 2013; Blasco-Belled et al., 2022; Ahmad and Vveinhardt, 2024). From the perspective of the broaden-and-build theory (2001), optimism functions not only as a cognitive disposition but also as a generator of positive emotions that broaden the repertoire of thoughts and actions available to the individual. Optimistic individuals are more likely to experience joy, hope, and confidence, and these positive emotions stimulate cognitive flexibility, creativity, and the exploration of alternative solutions. In the long run, these experiences lead to the building of durable resources, such as supportive social networks, adaptive coping skills, and psychological resilience, which sustain life satisfaction even in the face of challenges. Thus, optimism not only reduces the impact of stress but also actively contributes to the consolidation of personal and interpersonal resources that maintain subjective well-being over the long term.

***Hypothesis 5. There is a positive association between optimism and life satisfaction.***

Several empirical studies have highlighted a positive correlation between hope and life satisfaction. Valle and colleagues (2004) reported that, among adolescents, hope scores correlate significantly with overall life satisfaction. Furthermore, longitudinal data support the finding that higher levels of hope predict greater life satisfaction (Valle et al., 2006). Research conducted by Horton and Wallander (2001) examined the role of hope as a resilience factor against psychological distress among mothers caring for children with chronic physical conditions. The study included 111 participants and assessed the relationships between disability-related stress, hope, and psychological distress. The results showed that hope is negatively associated with distress and explains a significant portion of its variance, above and beyond the influence of disability-related stress. Moreover, the study suggests a buffering effect:

under conditions of high stress, mothers with higher levels of hope reported lower levels of distress compared to those with lower hope. In other words, hope functioned as a psychological buffer, diminishing the negative impact of stressful events. The study conducted by Yan and colleagues (2024) investigated the role of hope as a mediator between resilience and life satisfaction among Tibetan orphans. The research included 265 participants (131 orphans and 134 non-orphans), aged between 15 and 26. The authors used a mediation model to examine whether the dimensions of hope (belief in one's own capacity to initiate and sustain action, and the perceived capacity to generate alternative pathways toward goals) mediate the relationship between resilience and life satisfaction. The results showed that, among orphans, resilience is a significant predictor of life satisfaction, and hope played a mediating role. By contrast, among non-orphans, neither dimension of hope mediated the relationship, although resilience was positively associated with life satisfaction.

In conclusion, the specialized literature supports the view that hope is closely linked to life satisfaction through motivational and stress-management mechanisms. By orienting toward meaningful goals and flexibly adapting to obstacles, individuals with high hope experience a heightened perception of meaning and personal fulfillment. From the perspective of the broaden-and-build theory (Fredrickson, 2001), hope can be understood as a fundamentally future-oriented positive emotion that extends the range of thoughts and actions available to the individual. By focusing on goals and identifying alternative pathways to attain them, hope stimulates cognitive flexibility, creativity, and openness to opportunities. These processes contribute to the building of durable psychological and social resources that sustain life satisfaction even under conditions of stress. Thus, hope functions not only as an emotional buffer against adversity but also as a mechanism for the long-term consolidation of resources, explaining why individuals with high hope consistently report a superior quality of life and greater subjective well-being.

***Hypothesis 6. There is a positive association between hope and life satisfaction.***

### 2.3. The Experience of Meaning in Life and Life Satisfaction

The study conducted by Sameer, Eid, and Veenhoven (2023) provides a systematic synthesis of the literature on the relationship between perceived meaning in life and life satisfaction, using the World Database of Happiness as the main data source. The authors emphasize that both concepts represent subjective evaluations of quality of life and have been defined and measured in varied ways across empirical research. The results consistently indicate a significant positive correlation between the degree of perceived meaning in life and life satisfaction at the individual level. Individuals who report a higher perception of meaning tend to display greater satisfaction with their own existence. Analyses show that this association holds regardless of the research method (cross-sectional, longitudinal, or experimental studies), which suggests the robustness of the relationship. An essential aspect of the study is the distinction between "the presence of meaning" and "the search for meaning." The findings show that perceiving the presence of meaning in life is consistently positively associated with satisfaction, whereas merely searching for meaning does not show the same consistency, sometimes being neutral or even associated with lower levels of satisfaction. This distinction highlights the fundamental

role of integrating meaning into the individual's identity and life experiences. From a theoretical standpoint, the authors discuss the possibility of a bidirectional relationship: on the one hand, the perception of meaning contributes to increased satisfaction through mechanisms such as goal clarity and existential coherence; on the other hand, a high level of satisfaction may strengthen the perception that life has meaning.

The study conducted by Steger and Kashdan (2007) investigated the link between meaning in life and life satisfaction over a one-year longitudinal interval. The results show that the presence of meaning in life is closely associated with the level of satisfaction, with correlations between the two constructs being consistent and of moderate-to-high intensity ($r \approx .50$-$.60$). This suggests that individuals who perceive their lives as having coherence, purpose, and value also tend to report a globally positive evaluation of their own existence. At the same time, the dynamics of the relationship between the two variables suggest that high levels of meaning in life contribute to maintaining and strengthening satisfaction, while increased satisfaction favors the perception of life as full of significance. Thus, the relationship can be described as reciprocal. The study conducted by Wolfram (2023) investigates how meaning in life contributes to overall life satisfaction and how it can function both as a supportive resource and as a protective factor against tensions generated by family and professional roles. Theoretically grounded in Frankl's logotherapy, the research aims to clarify whether the perception of meaning in existence directly influences life satisfaction and whether it moderates the relationships between the importance attributed to roles and the stress experienced within them. The analysis, based on a sample of 891 participants from the United Kingdom, reveals that meaning in life is positively and significantly associated with life satisfaction, even when controlling for the effects of positive and negative affect. This finding confirms its central role as a determinant of subjective well-being. In addition, the results show that individuals with a high level of meaning benefit more from the importance attributed to family and professional roles, reporting higher levels of satisfaction. An essential aspect of the study concerns the protective role of meaning in life against tensions. When respondents perceived a high level of family stress, meaning reduced its negative effects on life satisfaction. By contrast, the absence of meaning amplified the impact of professional stress associated with the high importance attributed to the professional role, which underscores the vulnerability of individuals who do not find significance in their experiences. In conclusion, Wolfram's (2023) research shows that meaning in life is not only a direct predictor of life satisfaction but also an essential psychological resource that supports adaptation and resilience.

***Hypothesis 7. The experience of meaning in life is positively associated with life satisfaction.***

According to the broaden-and-build theory (Fredrickson, 2001), positive emotions play a central role in explaining how cognitive and experience of meaning in life translate into subjective well-being. Positive emotions broaden the individual's repertoire of thoughts and actions, stimulating cognitive flexibility, exploration, and openness to new perspectives. Over time, these emotions contribute to the building of durable psychological and social resources that sustain well-being and life satisfaction. Following this logic, the experience of meaning in life can favor the experience of positive affect such as joy, gratitude, or inner peace. Individuals who perceive their

existence as having purpose and a clear direction are more likely to experience positive emotions, since this outlook provides coherence and validation to daily experiences. Positive affect thus becomes the psychological mechanism through which the experience of meaning in life influences life satisfaction. It facilitates adaptive cognitive and motivational processes that reduce the impact of stressors and strengthen interpersonal connections, all of which contribute to a more favorable evaluation of one's own life.

***Hypothesis 8. The positive relationship between the experience of meaning in life and life satisfaction is mediated by positive affect.***

The study conducted by Krok and Telka (2019) on a sample of 205 Polish adolescents showed that both meaning in life and optimism correlate positively with subjective well-being (life satisfaction and positive affect) and with psychological well-being (personal growth, self-acceptance, positive relationships). The analyses showed that optimism acts as a partial mediator between meaning in life and both dimensions of well-being, while also reducing the impact of negative affect. Thus, adolescents who attribute significance to their existence tend to display higher levels of optimism, which facilitates both the hedonic and eudaimonic experiences of well-being (Krok and Telka, 2019). The conclusions suggest that, in adolescence, meaning in life does not function as an isolated psychological resource but operates through optimism, consolidating self-regulation processes and resilience. According to the theory proposed by Fredrickson (2001), the experience of meaning in life, by anchoring the individual in meaning and significance, facilitates the emergence of positive emotions that fuel an optimistic outlook on the future. Optimism extends the individual's cognitive and motivational repertoire, encouraging the adoption of adaptive strategies and the maintenance of hope for achieving personal goals. In the long term, this process contributes to building stable psychological resources that sustain higher levels of life satisfaction. Thus, optimism acts as the explanatory mechanism through which an orientation toward meaning is transformed into a positive and fulfilling evaluation of one's own existence.

The study by Ho, Cheung, and Cheung (2010) analyzed the relationship between meaning in life, optimism, and well-being among Chinese adolescents, with the main objective of testing the mediating role of optimism. The research was based on a large sample of 1,807 adolescents from Hong Kong, who completed questionnaires on personality, psychosocial problems, and satisfaction in various domains of life. The results showed that both meaning in life and optimism are positively correlated with life satisfaction (family, friends, school, health, self) and negatively correlated with psychosocial problems (anxiety, depression, alienation). The analyses showed that optimism partially mediates the link between meaning in life and positive well-being (life satisfaction), as well as negative well-being (psychosocial problems). In other words, adolescents who perceive meaning in their lives tend to display more optimism, which increases their level of satisfaction and reduces their vulnerability to emotional and social difficulties. A notable finding was that optimism had a consistent mediating role regardless of gender, suggesting that this psychological mechanism functions similarly for both boys and girls. Furthermore, the influence of meaning in life on life satisfaction was stronger in domains such as school, friends, and family than in relation to health. Regarding psychosocial problems, meaning in life more strongly predicted reductions in anxiety and depression compared to alienation. The conclusions of the

study support the idea that meaning in life and optimism are fundamental psychological resources for adolescents, contributing to their overall well-being. Moreover, optimism represents a key mechanism through which the meaning of personal existence is transformed into positive experiences and into the capacity to cope with emotional and social problems.

***Hypothesis 9. The positive relationship between the experience of meaning in life and life satisfaction is mediated by optimism.***

The study conducted by Bronk, Hill, Lapsley, Talib, and Finch (2009) examines the relationships between purpose in life, hope, and life satisfaction across three developmental stages: adolescence, young adulthood, and adulthood. The research was based on a sample of 806 participants, including 153 adolescents, 237 young adults, and 416 adults. The overall results showed that identifying a purpose in life is consistently associated with higher satisfaction across all age groups (Bronk et al., 2009). However, detailed analyses indicated notable differences between stages. In adolescence and young adulthood, both identifying and searching for a purpose were positively correlated with life satisfaction, reflecting the normative character of identity exploration during these periods. By contrast, among adults, searching for a purpose was negatively associated with satisfaction, suggesting that the absence of clear meaning in adulthood may represent a psychological vulnerability (Bronk et al., 2009). Another essential finding of the study concerns the mediating role of hope. Hope mediated the relationship between purpose and life satisfaction across all three age groups. From the perspective of the theory proposed by Fredrickson (2001), positive emotions and the cognitive orientations that derive from them broaden the individual's repertoire of thoughts and actions, facilitating both planning processes and the generation of alternatives in the face of obstacles. The experience of meaning in life, through its orientation toward meaning and significance, creates the conditions for experiencing fundamental positive emotions such as hope. Hope, in turn, represents a future-oriented positive emotion that stimulates cognitive flexibility, creativity, and the maintenance of motivation toward achieving personal goals. According to the theory, these effects contribute to the building of durable psychological resources that sustain higher levels of life satisfaction. In other words, the experience of meaning in life favors the emergence of hope, which acts as a mediating mechanism that transforms an orientation toward meaning into a robust predictor of subjective well-being.

***Hypothesis 10. The positive relationship between the experience of meaning in life and life satisfaction is mediated by hope.***

## 3. Methodology

### 3.1. Participants and Procedure

The sample consisted of 196 individuals, of whom 155 (79.1%) were female and 41 (20.9%) were male. Participants' age ranged from 18 to 70 years, with a mean age of 42.09 years (SD = 10.70), indicating a balanced distribution among young, middle-aged, and older adults. Regarding marital status, 116 participants (59.2%) reported being married, 39 (19.9%) were in a relationship, and 41 (20.9%) were single. In terms of educational level, the majority of participants had completed a university degree (44.9%) or a master's degree (44.4%), while 9.7% had completed high school,

and .5% indicated other forms of education (general school or another unspecified category). Regarding the economic sector of activity, participants came from a variety of fields, giving the sample a diversified structure. The most frequently represented sectors were education (16.8%), medical, social, and law-enforcement services (9.2%), and the "Other" category (27%), which included various unspecified fields. Lower percentages were also reported for public administration and government (6.1%), arts, entertainment, and sports (6.1%), commercial services (6.6%), construction (5.1%), transport and distribution (4.1%), trade (4.1%), banking and finance (2.6%), manufacturing industry (2.6%), hospitality and restaurants (2.6%), as well as agriculture (.5%). Regarding tenure at their current job, this ranged from 1 to 44 years, with a mean of 12.77 years (SD = 10.25), suggesting considerable diversity in respondents' professional experience. The study employed a cross-sectional design, conducted on a convenience sample. Participants were recruited through the online distribution of a self-report questionnaire, completed voluntarily and anonymously. Prior to participation, respondents were informed about the general purpose of the research, data confidentiality, and the possibility of withdrawing at any time without consequences. Completing the questionnaire required approximately 15 minutes, and all data were collected and analyzed in aggregate form, exclusively for scientific purposes.

### 3.2. Measurement Instruments

*Life satisfaction* was measured using the Satisfaction With Life Scale (Diener, Emmons, Larsen and Griffin, 1985), a short instrument frequently used in the assessment of subjective well-being. The scale contains five globally worded items, to which participants respond on a 7-point Likert scale (1 = "strongly disagree," 7 = "strongly agree"). Scores are obtained by summing the responses, resulting in an index of overall life satisfaction. The scale was translated and culturally adapted for Romania by Stevens and colleagues (2012), demonstrating adequate psychometric properties.

*Positive affect* was measured using the Positive and Negative Affect Schedule – Short Form (PANAS-C-SF; Sanmartín et al., 2018). The scale consists of a series of words and statements describing different feelings and emotions, with participants indicating the extent to which they had felt this way over the past week. Responses are recorded on a 5-point Likert scale (1 = "very slightly or not at all," 5 = "extremely"). The positive affect subscale includes 5 items ("cheerful," "lively," "happy," "joyful," and "proud"), with scoring obtained by summing the items.

*Optimism* was measured using the Life Orientation Test – Revised (LOT-R; Scheier, Carver, and Bridges, 1994). Participants were instructed to respond as honestly and accurately as possible, expressing their own feelings, with no "correct" or "incorrect" answers. Responses were recorded on a 5-point Likert scale (1 = "strongly disagree," 5 = "strongly agree"). The scale contains positively worded items, such as "In uncertain times, I usually expect the best" or "Overall, I expect more good things to happen to me than bad," as well as reverse-worded items, such as "If something can go wrong for me, it will" or "I rarely count on good things happening to me."

*Hope* was measured using the State Hope Scale (Snyder et al., 1996). Participants carefully read each statement and selected the number that best described how they perceived themselves at that moment, after focusing their attention on themselves and on what was happening in their lives "here and now." The response

scale is an 8-point Likert scale (1 = "definitely false," 8 = "definitely true"). Sample items include: "If I should find myself in a difficult situation, I could find many ways to get out of it," "At present, I am pursuing my goals with determination."

*The experience of meaning in life* was measured using the Meaning in Life Experience Scale, which contains 37 items, rated on a 7-point Likert scale (1 = "strongly disagree" to 7 = "strongly agree"), with higher scores indicating a higher level of experienced meaning in life. In a previous study, the instrument demonstrated high convergent validity, correlating positively with life satisfaction and the presence of meaning, and negatively with the search for meaning, thereby supporting the theoretical and applied validity of the construct.

### 3.3. Data Analysis

Data were analyzed using Pearson correlation coefficients to examine the associations among the study variables. Internal consistency was assessed using Cronbach's alpha coefficients. To test the mediating roles of positive affect, optimism, and hope in the relationship between the experience of meaning in life and life satisfaction, a multiple mediation analysis was conducted using PROCESS Model 4, with 5,000 bootstrap samples and 95% confidence intervals.

## 4. Results

### 4.1. Reliability of the Measures

In this study, the Satisfaction With Life Scale showed very good internal consistency, with a Cronbach's α coefficient of .85, indicating high reliability in measuring the construct. The positive affect subscale of the Positive and Negative Affect Schedule – Short Form showed excellent internal consistency, with a Cronbach's α coefficient of .89, indicating high reliability in measuring positive emotions. The State Hope Scale showed excellent internal consistency, with a Cronbach's α coefficient of .88, indicating high reliability in measuring current hope levels. The Life Orientation Test – Revised showed good internal consistency, with a Cronbach's α coefficient of .79, indicating adequate reliability in measuring optimism levels. Finally, the Meaning in Life Experience Scale demonstrated excellent internal consistency, with a Cronbach's α coefficient of .94, indicating very high reliability of measurement.

### 4.2. Zero-Order Correlations

The results of the Pearson correlation analysis showed statistically significant positive associations ($p < .01$) among all the investigated variables. Life satisfaction correlated positively with positive affect ($r = .56$), optimism ($r = .46$), hope ($r = .64$), and the experience of meaning in life ($r = .54$), confirming Hypotheses 4, 5, 6, and 7. Positive affect correlated positively with optimism ($r = .48$), hope ($r = .59$), and the experience of meaning in life ($r = .48$), confirming Hypothesis 1. Optimism correlated positively with hope ($r = .57$) and the experience of meaning in life ($r = .71$), confirming Hypothesis 2, while hope correlated positively with the experience of meaning in life ($r = .64$), confirming Hypothesis 3.

**Table 1. Correlations among the investigated variables**

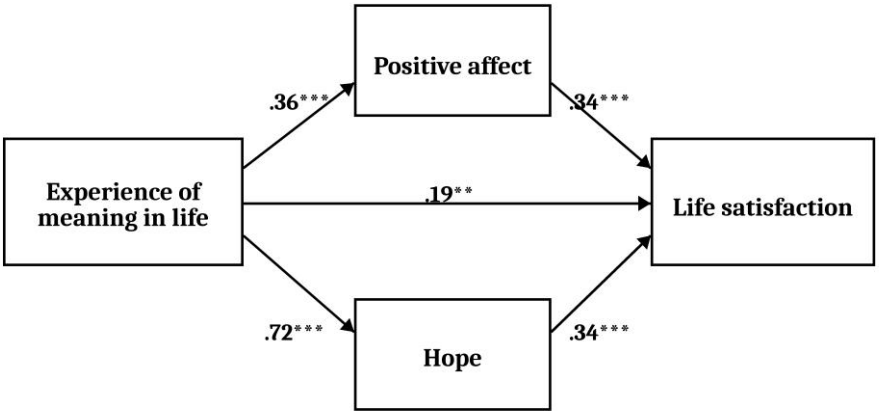
| Variable | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| 1. Life satisfaction | | | | |
| 2. Positive affect | .56** | | | |
| 3. Optimism | .46** | .48** | | |
| 4. Hope | .64** | .59** | .57** | |
| 5. Experience of meaning in life | .54** | .48** | .71** | .64** |

*Source: Author's calculations.*

### 4.3. Mediation Analysis

To test the role of positive affect, optimism, and hope as mediators of the relationship between the experience of meaning in life and life satisfaction, Model 4 from the PROCESS v4.0 macro was used, with 5,000 bootstrap samples and a 95% confidence interval. The results indicated that the experience of meaning in life significantly predicts positive affect, b = .36, SE = .05, t = 7.54, p < .001, 95% CI [.26, .45], optimism, b = .57, SE = .04, t = 14.16, p < .001, 95% CI [.49, .65], and hope, b = .72, SE = .06, t = 11.45, p < .001, 95% CI [.60, .84]. The overall model predicting life satisfaction was significant, $F(4, 191) = 44.08$, $p < .001$, $R^2 = .48$, explaining 48% of the variance in life satisfaction. In this model, the experience of meaning in life had a significant direct effect on life satisfaction, b = .19, SE = .08, t = 2.29, p = .02, 95% CI [.03, .35]. Among the included mediators, positive affect (b = .34, SE = .09, t = 3.77, p < .001, 95% CI [.16, .51]) and hope (b = .34, SE = .07, t = 5.07, p < .001, 95% CI [.21, .47]) had significant direct effects on life satisfaction, whereas optimism was not a significant predictor (b = –.02, SE = .10, t = –.16, p = .87). The effects analysis showed a total effect of the experience of meaning in life on life satisfaction of b = .35. Among the included mediators, positive affect (b = .12) and hope (b = .24) had significant indirect effects, while optimism did not show a significant indirect effect (b = –.01). Thus, the results support a partial multiple-mediation model, in which the experience of meaning in life influences life satisfaction both directly and indirectly, through positive affect and hope. These results support Hypotheses 8 and 10, but not Hypothesis 9.

**Figure 1. Multiple mediation model**




*Note. Unstandardized regression coefficients are displayed on the paths. Positive affect and hope were significant mediators of the relationship between the experience of meaning in life and life satisfaction, whereas optimism was not retained in the final displayed model.*

*Source: Author's elaboration.*

### 4.4. Gender Differences

The analysis of gender differences for the five investigated variables (life satisfaction, positive affect, optimism, hope, and the experience of meaning in life) did not reveal significant differences between women and men. Although women recorded slightly higher means for life satisfaction (M = 5.52), positive affect (M = 3.71), optimism (M = 3.81), hope (M = 6.62), and the experience of meaning in life (M = 5.31) compared to men (between M = 5.28 and M = 6.52), these differences did not reach statistical significance, with all p-values greater than .05. Independent-samples t-tests confirmed the absence of systematic variation between the two groups. For example, life satisfaction: $t(194) = 0.60$, $p = .550$; optimism: $t(194) = 0.78$, $p = .435$; hope: $t(194) = 0.54$, $p = .591$, suggesting that levels of subjective and existential well-being are comparable between women and men within the analyzed sample. These results indicate that gender does not constitute a relevant predictor for these dimensions of psychological functioning.

### 4.5. Relationship with Age

The correlation analysis revealed significant positive relationships between age and several of the studied variables. Specifically, age was positively associated with life satisfaction, $r = .208$, $p = .003$, indicating that older individuals tend to report a higher level of overall life evaluation. Age was also significantly correlated with optimism, $r = .173$, $p = .016$, as well as with hope, $r = .175$, $p = .014$, suggesting that

maturation may be associated with a more positive outlook on the future and an increased sense of personal resources. In addition, a significant positive correlation was observed between age and the experience of meaning in life, $r = .185$, $p = .010$, indicating a tendency among older individuals to display a slightly higher level of experienced meaning in life. By contrast, positive affect did not show a significant relationship with age, $r = .019$, $p = .792$, suggesting that the frequency of positive affect is relatively stable across adulthood. Overall, the results show that age is systematically associated with dimensions of cognitive and existential well-being, but less so with day-to-day positive affect.

## 5. Discussion

The study results indicated very good reliability for all instruments used. All scales showed high levels of internal consistency, demonstrating that the measurements were stable and coherent for the constructs assessed: life satisfaction, positive affect, optimism, hope, and the experience of meaning in life. Specifically, for the Meaning in Life Experience Scale, the values obtained were similar to those reported in the previous study, confirming the stability and robustness of its psychometric properties and supporting the use of the instrument in future research. The correlation analysis showed significant positive relationships among all the investigated variables. Life satisfaction was positively associated with positive affect, optimism, hope, and the experience of meaning in life. Positive affect was also positively correlated with optimism, hope, and the experience of meaning in life, while optimism and hope were positively associated with the experience of meaning in life. These results confirm the existence of consistent links among the variables included in the model. Moreover, the correlation pattern obtained for the Meaning in Life Experience Scale reproduces the trends observed in the previous study, providing additional support for the scale's convergent validity and for its relevance in investigating the constructs of meaning and well-being.

The mediation analysis revealed that the experience of meaning in life significantly predicts positive affect, optimism, and hope. The overall model predicting life satisfaction was significant, explaining a considerable proportion of its variance. The experience of meaning in life had both a direct effect and indirect effects on life satisfaction. Among the mediating variables, positive affect and hope had significant effects on life satisfaction, whereas optimism did not have a relevant predictive role. Overall, the results support a partial mediation model, according to which the experience of meaning in life influences life satisfaction both directly and indirectly, through positive affect and hope.

## 6. Conclusions

The present study examined the relationship between the experience of meaning in life and life satisfaction, focusing on the mediating roles of positive affect, optimism, and hope. The findings showed that the experience of meaning in life was positively associated with life satisfaction and with the psychological resources included in the model. The results also indicated that positive affect and hope significantly mediated the relationship between the experience of meaning in life and life satisfaction, whereas optimism did not emerge as a significant mediator.

These findings suggest that the experience of meaning in life contributes to subjective well-being both directly and indirectly, particularly through affective and

motivational mechanisms. Positive affect appears to represent an emotional pathway through which meaning is translated into a more favorable evaluation of one's life, while hope reflects a goal-directed motivational pathway that supports life satisfaction. By contrast, although optimism was strongly associated with meaning in life, its explanatory role was not significant when positive affect and hope were included in the same model.

Overall, the study supports the relevance of meaning in life as a psychological resource associated with life satisfaction and highlights the importance of positive affect and hope in explaining this relationship. The findings may inform psychological, educational, and counseling interventions aimed at strengthening subjective well-being through meaning-oriented reflection, positive emotional experiences, and goal-directed hopeful thinking.

## 7. Theoretical and Practical Implications

The results obtained align closely with the broaden-and-build theory (Fredrickson, 2001), offering a coherent explanation of how the experience of meaning in life translates into indicators of well-being. Within this framework, a more pronounced experience of meaning in life, integrating meaning, coherence, and personal direction, is associated with more frequent experiences of positive emotion. These affective states, in turn, extend the cognitive and behavioral repertoire and facilitate the accumulation of durable personal resources, supporting more favorable global evaluations of life. Thus, the observed dynamics are compatible with the theoretical sequence proposed by broaden-and-build: positive emotions broaden the scope of attention and action and, over the long term, consolidate motivational and self-regulatory resources relevant to life satisfaction. The synthesis by Sameer, Eid, and Veenhoven (2023) and the longitudinal data reported by Steger and Kashdan (2007) consistently show that perceived meaning in life is positively associated with life satisfaction, suggesting a robust relationship both cross-sectionally and over time. Our results align with this direction, positioning the experience of meaning in life as the integrated expression of personal meaning and coherence that correlates with more favorable evaluations of one's own existence. Furthermore, the concordance with works that distinguish between "the presence of meaning" and "the search for meaning" supports the idea that the integration of meaning, rather than mere searching, is the component relevant to subjective well-being.

In terms of explanatory mechanisms, positive affect and hope emerge as the variables through which the experience of meaning in life is linked to life satisfaction, in line with the broaden-and-build perspective. The reviewed literature indicates a reciprocal potentiation between meaning and positive affect across ages and diverse cultural contexts, as well as a close interdependence between meaning and hope. These results suggest that positive emotions and hope function complementarily: the former broaden cognitive and behavioral flexibility, while the latter channels motivational energy toward goals, maintaining direction in the face of obstacles. In this way, experience of meaning in life is transformed into affective and motivational resources capable of sustaining positive evaluations of life. A nuanced element concerns the positioning of optimism within this dynamic. Although the current literature documents positive associations between optimism and well-being, the present results suggest that the explanatory role of optimism is less distinct than that of positive affect

and hope. From a theoretical perspective, this can be interpreted as a functional hierarchy of resources: the favorable general expectancies characteristic of optimism are probably subsumed under more proximal affective and motivational routes (positive emotions and hope), which carry more weight in translating meaning into life satisfaction. Thus, the data contribute to refining the broaden-and-build framework, highlighting that not all psychological resources have the same procedural status in the chain that runs from meaning to well-being. Another possible explanation for the absence of a mediating effect of optimism is that it was measured as a trait, which makes it less variable from one point in time to another—a characteristic unsuited to a mediator.

The results consolidate the positioning of the experience of meaning in life as a resource that leads to the broadening of the repertoire and the building of resources, consistent with broaden-and-build, and they overlap with the evidence in the specialized literature regarding the relationship between meaning, positive emotions, hope, and life satisfaction. By concurrently articulating positive affect and hope as mediating mechanisms, the present contribution integrates two complementary pathways (the affective and the motivational) through which the experience of meaning in life is converted into positive evaluations of one's own existence.

The results of the study offer directions for developing psychological and educational interventions centered on cultivating the experience of meaning in life as a fundamental resource for subjective well-being. Since the analysis showed that the experience of meaning in life influences life satisfaction both directly and indirectly, through positive affect and hope, interventions that stimulate reflection on personal meaning, the clarification of values, and the integration of life experiences may have a significant impact on overall well-being. Counseling and personal-development programs could include exercises for exploring personal significance, reflective journaling, or goal-setting activities congruent with individual values, with the aim of consolidating a sense of existential coherence. From the perspective of the broaden-and-build theory (Fredrickson, 2001), the promotion of positive emotions constitutes a major practical tool for consolidating well-being. Activities such as cultivating gratitude, identifying everyday sources of joy, and encouraging engagement in prosocial behaviors can generate a positive cycle of emotions and psychological resources. Psychological training programs can use cognitive reframing and mindfulness techniques to enhance awareness of positive emotions and reduce the impact of negative experiences, thereby supporting the mechanisms of broadening and building resources. Additionally, hope, identified as a significant mediator of the relationship between the experience of meaning in life and life satisfaction, can be cultivated through goal-setting interventions. These may include formulating realistic goals, identifying alternative courses of action, and training personal initiative, contributing to the development of an active and flexible orientation toward the future. Such exercises can be integrated both into individual counseling and into educational or organizational programs, with the potential to increase motivation and psychological resilience.

## 8. Limitations and Future Directions

The present study has several limitations that should be considered when interpreting the results. First, the sample was predominantly composed of women,

which may influence the generalizability of the conclusions and limits the extent to which the results can be extrapolated to the general population. This gender imbalance may be relevant in the context of well-being studies, since differences in emotional socialization and affective expression can influence the reported levels of the investigated variables. Second, the cross-sectional design of the research does not allow for causal conclusions. Although the results support the existence of significant associations among the experience of meaning in life, positive affect, hope, optimism, and life satisfaction, the direction of these relationships cannot be established with certainty. It is equally possible that a higher level of life satisfaction contributes to the development of a more pronounced experience of meaning in life or to an increased frequency of positive emotions, suggesting a bidirectional process. For example, the study by King, Hicks, Krull, and Del Gaiso (2006) explored the link between positive affect and the experience of meaning in life across six studies. The results show that positive dispositions are stronger predictors of perceiving life as meaningful, that daily positive affect predicts global meaning in life, and that inducing positive emotions enhances meaning in life. The central conclusion is that positive emotions not only result from a meaningful life but can actively contribute to perceiving life as full of significance.

Another limitation concerns the exclusive use of self-report instruments. These can be influenced by subjective factors such as social desirability, self-perception bias, or variations in response style, which may affect the accuracy of the collected data. Integrating complementary methods, such as behavioral assessments, semi-structured interviews, or longitudinal data, could offer a more objective perspective on the relationships investigated. Furthermore, the study was conducted exclusively on a Romanian population, which limits the international applicability of the results. Cultural factors can influence how individuals interpret and report meaning in life, positive emotions, or life satisfaction, which is why it would be useful to replicate the research on samples from other cultures in order to assess the stability of the proposed model. Finally, the relatively small sample size did not allow for the testing of complex structural models, which could have offered a more detailed picture of the relationships among the variables. Future research should include larger and more diverse samples and use longitudinal designs or structural equation modeling (SEM).

**References:**

1. Ahmad, N., and Vveinhardt, J. (2024). Effect of an optimistic approach on individual life satisfaction. *Revista de la Universidad del Zulia*, 15(43), 79–95.
2. Alarcon, G. M., Bowling, N. A., and Khazon, S. (2013). Great expectations: A meta-analytic examination of optimism and hope. *Personality and Individual Differences*, 54, 821–827. https://doi.org/10.1016/j.paid.2012.12.004
3. Blasco-Belled, A., Rogoza, R., Torrelles-Nadal, C., and Alsinet, C. (2022). Differentiating optimists from pessimists in the prediction of emotional intelligence, happiness, and life satisfaction: A latent profile analysis. *Journal of Happiness Studies*, 23(5), 2371–2387. https://doi.org/10.1007/s10902-022-00507-4
4. Brassai, L., Piko, B. F., and Steger, M. F. (2011). Meaning in life: Is it a protective factor for adolescents' psychological health? International Journal of Behavioral Medicine, 18(1), 44–51. https://doi.org/10.1007/s12529-010-9089-6

5. Bronk, K. C., Hill, P. L., Lapsley, D. K., Talib, T. L., and Finch, H. (2009). Purpose, hope, and life satisfaction in three age groups. *The Journal of Positive Psychology*, 4(6), 500–510. https://doi.org/10.1080/17439760903271439
6. Cioacă, V. O. (2025). Loneliness between Structural Objectivity and Lived Subjectivity: An Integrative Analysis of Contemporary Sociological Theories. *Revista Universitară de Sociologie*, 21(1), 60–76.
7. Cohn, M. A., Fredrickson, B. L., Brown, S. L., Mikels, J. A., and Conway, A. M. (2009). Happiness unpacked: Positive emotions increase life satisfaction by building resilience. *Emotion*, 9(3), 361–368. https://doi.org/10.1037/a0015952
8. Diener, E., Emmons, R. A., Larsen, R. J., and Griffin, S. (1985). The Satisfaction With Life Scale. *Journal of Personality Assessment*, 49(1), 71–75. https://doi.org/10.1207/s15327752jpa4901_13
9. Edwards, M. E., Booker, J. A., Cook, K., Miao, M., Gan, Y., and King, L. A. (2025). Hope as a meaningful emotion: Hope, positive affect, and meaning in life. *Emotion*, 25(6), 1365–1380. https://doi.org/10.1037/emo0001513
10. Feldman, D. B., and Snyder, C. R. (2005). Hope and the meaningful life: Theoretical and empirical associations between goal-directed thinking and life meaning. *Journal of Social and Clinical Psychology*, 24(3), 401–421. https://doi.org/10.1521/jscp.24.3.401.65616
11. Fredrickson, B. L. (2001). The role of positive emotions in positive psychology: The broaden-and-build theory of positive emotions. *American Psychologist*, 56(3), 218–226. https://doi.org/10.1037/0003-066X.56.3.218
12. Garvin, G., and Putri, R. A. (2021). The relationship between optimism and subjective well-being in COVID-19 pandemic context. Proceedings of the International Conference on Economics, Business, Social, and Humanities (ICEBSH 2021), 80–83. Atlantis Press. https://doi.org/10.2991/assehr.k.210805.012
13. Ginevra, M. C., Sgaramella, T. M., Ferrari, L., Nota, L., Santilli, S., and Soresi, S. (2017). Visions about future: A new scale assessing optimism, pessimism, and hope in adolescents. *International Journal for Educational and Vocational Guidance*, 17, 187–210. https://doi.org/10.1007/s10775-016-9324-z
14. Hicks, J. A., Trent, J., Davis, W. E., and King, L. A. (2012). Positive affect, meaning in life, and future time perspective: An application of socioemotional selectivity theory. *Psychology and Aging*, 27(1), 181–189. https://doi.org/10.1037/a0023965
15. Ho, M. Y., Cheung, F. M., and Cheung, S. F. (2010). The role of meaning in life and optimism in promoting well-being. *Personality and Individual Differences*, 48(5), 658–663. https://doi.org/10.1016/j.paid.2010.01.008
16. Horton, T. V., and Wallander, J. L. (2001). Hope and social support as resilience factors against psychological distress of mothers who care for children with chronic physical conditions. *Rehabilitation Psychology*, 46, 382–399. https://doi.org/10.1177/0734282904022004
17. Ju, H., Shin, J. W., Kim, C. W., Hyun, M. H., and Park, J. W. (2013). Mediational effect of meaning in life on the relationship between optimism and well-being in community elderly. *Archives of Gerontology and Geriatrics*, 56(2), 309–313. https://doi.org/10.1016/j.archger.2012.08.008

18. Kállay, É. (2008). Investigation of the relationship between religious growth, positive affect, and meaning in life in a sample of female cancer patients. *Cognition, Brain, Behavior*, 12(2), 161–182.
19. Karataş, Z., Uzun, K., and Tagay, Ö. (2021). Relationships between life satisfaction, meaning in life, hope and COVID-19 fear for Turkish adults during the COVID-19 outbreak. *Frontiers in Psychology*, 12, 633384. https://doi.org/10.3389/fpsyg.2021.633384
20. King, L. A., Hicks, J. A., Krull, J. L., and Del Gaiso, A. K. (2006). Positive affect and the experience of meaning in life. *Journal of Personality and Social Psychology*, 90(1), 179–196. https://doi.org/10.1037/0022-3514.90.1.179
21. Krok, D., and Telka, E. (2019). Optimism mediates the relationships between meaning in life and subjective and psychological well-being among late adolescents. *Current Issues in Personality Psychology*, 7(1), 32–42. https://doi.org/10.5114/cipp.2018.79960
22. Lucas, R. E., Diener, E., and Suh, E. M. (1996). Discriminant validity of well-being measures. *Journal of Personality and Social Psychology*, 71(3), 616–628.
23. Lyubomirsky, S., King, L., and Diener, E. (2005). The benefits of frequent positive affect: Does happiness lead to success? Psychological Bulletin, 131(6), 803–855.
24. Majeed, N. M., Tan, J. J. X., Tov, W., and Hartanto, A. (2021). Dispositional optimism as a buffer against emotional reactivity to daily stressors: A daily diary approach. *Journal of Research in Personality*, 93, 104105. https://doi.org/10.1016/j.jrp.2021.104105
25. Mascaro, N., and Rosen, D. H. (2005). Existential meaning's role in the enhancement of hope and prevention of depressive symptoms. *Journal of Personality*, 73(4), 985–1014. https://doi.org/10.1111/j.1467-6494.2005.00336.x
26. Miao, M., Zheng, L., and Gan, Y. (2017). Meaning in life promotes proactive coping via positive affect: A daily diary study. *Journal of Happiness Studies*, 18(6), 1683–1696. https://doi.org/10.1007/s10902-016-9791-4
27. Miao, M., Zheng, L., and Gan, Y. (2021). Future-oriented function of meaning in life: Promoting hope via future temporal focus. *Personality and Individual Differences*, 179, 110897. https://doi.org/10.1016/j.paid.2021.110897
28. Pan, J.-Y., Wong, D. F. K., Chan, C. L. W., and Joubert, L. (2008). Meaning of life as a protective factor of positive affect in acculturation: A resilience framework and a cross-cultural comparison. *International Journal of Intercultural Relations*, 32(6), 505–514. https://doi.org/10.1016/j.ijintrel.2008.08.002
29. Otovescu, M.C. (2026). Quality of Life. In Otovescu, D. and Otovescu, C. (eds.), *Contemporary Sociology: Fields of Study and Representative Concepts*, Vol. 1, 271–314. Craiova: Beladi.
30. Sameer, Y., Eid, Y., and Veenhoven, R. (2023). Perceived meaning of life and satisfaction with life: A research synthesis using an online finding archive. *Frontiers in Psychology*, 13, 957235. https://doi.org/10.3389/fpsyg.2022.957235
31. Sanmartín, R., Vicent, M., Gonzálvez, C., Inglés, C. J., Díaz-Herrero, Á., Granados, L., and García-Fernández, J. M. (2018). Positive and Negative Affect Schedule-Short Form: Factorial invariance and optimistic and pessimistic affective profiles in Spanish children. *Frontiers in Psychology*, 9, 392. https://doi.org/10.3389/fpsyg.2018.00392

32. Scheier, M. F., Carver, C. S., and Bridges, M. W. (1994). Distinguishing optimism from neuroticism (and trait anxiety, self-mastery, and self-esteem): A reevaluation of the Life Orientation Test. *Journal of Personality and Social Psychology*, 67(6), 1063–1078.
33. Snyder, C. R., Sympson, S. C., Ybasco, F. C., Borders, T. F., Babyak, M. A., and Higgins, R. L. (1996). Development and validation of the State Hope Scale. *Journal of Personality and Social Psychology*, 70(2), 321–335. https://doi.org/10.1037/0022-3514.70.2.321
34. Steger, M. F., and Kashdan, T. B. (2007). Stability and specificity of meaning in life and life satisfaction over one year. *Journal of Happiness Studies*, 8(2), 161–179. https://doi.org/10.1007/s10902-006-9011-8
35. Trudel-Fitzgerald, C., James, P., Kim, E. S., Zevon, E. S., Grodstein, F., and Kubzansky, L. D. (2019). Prospective associations of happiness and optimism with lifestyle over up to two decades. *Preventive Medicine*, 126, 105754. https://doi.org/10.1016/j.ypmed.2019.105754
36. Valle, M. F., Huebner, E. S., and Suldo, S. M. (2004). Further evaluation of the Children's Hope Scale. *Journal of Psychoeducational Assessment*, 22(4), 320–337.
37. Valle, M. F., Huebner, E. S., and Suldo, S. M. (2006). An analysis of hope as a psychological strength. *Journal of School Psychology*, 44(5), 393–406. https://doi.org/10.1016/j.jsp.2006.03.005
38. Wolfram, H.-J. (2023). Meaning in life, life role importance, life strain, and life satisfaction. *Current Psychology*, 42, 29905–29917. https://doi.org/10.1007/s12144-022-04031-9
39. Yan, W., Huang, Q., Wang, Y., Ni, Z., Peng, K., and Zhang, P. (2024). Hope as the mediator in the relation between resilience and life satisfaction among Tibetan orphans. *SAGE Open*, 14(2), 1–10. https://doi.org/10.1177/21582440241252003

# Dimensions of Poverty in Romania

**Cosmin-Constantin SICREA**
Assistant Lecturer, PhD (Associate), University of Petroşani, Faculty of Economics, Administrative and Social Sciences, Romania
Email: cosmin_sicrea2005@yahoo.com

***Abstract:*** *Poverty in Romania represents a major structural challenge, with national indicators regarding the risk of poverty and social exclusion (AROPE) consistently maintaining alarming levels within the European hierarchy. These disparities are particularly pronounced among large families and within rural areas. In this context, a marked geographic determinism is evident, as rural environments are burdened by systemic poverty resulting from a deficit of material capital and limited opportunities for professional integration in the formal sector. From a demographic perspective, large households face a disproportionate risk of intergenerational transmission of poverty. The high dependency ratio within these families, coupled with precarious access to quality early childhood education and healthcare services, limits the future human capital of the younger generation. Consequently, poverty becomes a cyclical legacy, where the lack of initial resources hinders the acquisition of the skills necessary for competitive integration into the modern labor market. The structural landscape of Romanian poverty is increasingly shaped by a profound demographic transition, characterized by an accelerated aging process and a shrinking working-age population. This shift creates a skewed dependency ratio, where a diminishing tax base must support an expanding elderly cohort. In rural areas, this phenomenon is particularly acute, as the departure of the youth leaves behind 'gerontic enclaves'—communities where poverty is exacerbated by physical isolation and the collapse of local support networks.*

***Keywords:*** *poverty; dimensions; exclusion; disability; social protection*

## 1. Methodology

The methodology of the present study is predicated on the analysis of statistical data and research conducted under the auspices of the National Institute of Statistics, the Romanian Government, and Eurostat with the aim of elucidating the contemporary facets of poverty, which manifest in diverse forms across Romania as well as the primary challenges identified in this regard.

## 2. Introduction

Poverty is a multidimensional phenomenon that extends beyond a mere lack of income, encompassing social exclusion and a lack of access to education, healthcare, and societal opportunities. Within the literature, a clear distinction is made between the biological survival threshold and the prevailing societal standard of living. Absolute Poverty, concept refers to an individual's inability to satisfy their basic needs, while relative poverty represents a condition where household income is a certain percentage below the median income of that specific country. Using these two concepts, we will attempt to outline the facets and implications of poverty in Romania along with the overall evolution of the phenomenon.

## 3. Absolute and Relative Poverty: Conceptual Delimitations

According to Mărginean, the definition is as follows: "Absolute poverty represents the inability of an individual or a family to fulfill the basic needs required for survival, being defined in relation to a minimum consumption basket that includes strictly necessary food and non-food items" (2021: 56). At the international level, the

World Bank employs an absolute poverty line expressed in dollars at Purchasing Power Parity (PPP), which is periodically updated to reflect evolving global economic realities. The absolute poverty line, established by international financial institutions, serves as a universal indicator for monitoring global progress in eliminating extreme deprivation, regardless of the cultural context or the economic development of a specific state" (Popescu and Ionescu, 2023: 112). Absolute poverty is grounded in universal human needs that remain constant across different countries and eras. The physiological requirements for calories, vitamins, proteins, water, and shelter are identical for any individual, whether they reside in Romania or Sub-Saharan Africa. The fundamental characteristic of absolute poverty is its anchoring in minimum physiological standards, remaining independent of consumption patterns or the welfare levels of the rest of society" (Mărginean, 2021: 58). Its measurement is conducted through the cost-of-basic-needs approach (or the consumption basket method). If an individual's income fails to cover the cost of this basket, they are considered to be in a state of absolute poverty. This basket includes: foodstuffs (approximately 2, 100 - 2, 400 kcal/day) and essential non-food items (clothing, hygiene products, and fuel for cooking and heating). Absolute poverty is frequently associated with conditions of profound crisis. It does not merely affect personal comfort but jeopardizes physical integrity and life expectancy. As Stoica emphasizes, "absolute poverty implies a state of deprivation so severe that human dignity and survival are directly threatened by the lack of elementary resources" (2020: 92).

While relative poverty fluctuates in tandem with economic cycles, absolute poverty relies on a fixed threshold (for instance, the $2.15/day benchmark established by the World Bank for extreme poverty in underdeveloped nations). Should incomes rise above this point, absolute poverty statistically vanishes, even if high levels of inequality persist. A tragic hallmark of this phenomenon is its partial irreversibility: children living in absolute poverty suffer from nutritional deficiencies that permanently impair cognitive development, thereby perpetuating the 'vicious cycle of poverty.'

**Table 1. Characteristics of Absolute Poverty**

| Characteristic | Description |
|---|---|
| Foundation | Biological needs (food, shelter). |
| Measurement | Income < Cost of the minimum consumption basket. |
| Stability | The threshold remains unchanged even if society becomes wealthier. |
| Policy objective | Total eradication (UN Sustainable Development Goal No. 1 – SDG). |

*Source: Generated by the author.*

In developed states (as is the case with Romania within the European Union), the focus lies on relative poverty; nonetheless, absolute poverty remains a critical indicator in isolated rural areas or among highly marginalized groups.Thus, "while relative poverty fluctuates alongside the evolution of general societal welfare, absolute poverty remains anchored in fundamental physiological and material needs, often being associated with malnutrition and a lack of access to basic medical services" (Stoica, 2020: 89).

Relative Poverty is a concept that measures the degree of deprivation in relation to the general standard of living within a specific society. Unlike absolute poverty—which concerns basic survival—relative poverty focuses on inequality and social exclusion.

"Relative poverty is not merely a lack of financial means, but a lack of material, cultural, and social resources that prevents individuals from participating in community activities and achieving living conditions considered normal within that society" (Zamfir, 2019: 42). The calculation of relative poverty is not based on a minimum consumption basket (as is the case with absolute poverty), but rather on an individual's position relative to the rest of the population. In the European Union and Romania, the standard methodology is established by Eurostat, operationalized as the "risk of poverty," and is strictly linked to income distribution across the population. Relative poverty is statistically defined by a threshold of 60% of the median equivalised disposable income, indicating a position of economic disadvantage relative to other citizens rather than a lack of subsistence resources" (Mărginean and Precupetu, 2020: 72).

Another crucial aspect of relative poverty is its impact on civic participation. An individual may have sufficient food but may be unable to afford to send their children on school trips or participate in socio-cultural events, which can lead to social isolation. "Relative poverty reflects the social distance between population groups, serving as an indicator of social cohesion". It demonstrates the extent to which a segment of the population is left behind despite general economic growth (Stănculescu, 2022: 45).

Thus, according to the authors' assertions, it can be stated that: "relative poverty exhibits certain characteristics":

- **Contextual Subjectivity:** The poverty threshold varies from one country to another. For instance, a citizen classified as "relatively poor" in Luxembourg might be considered "affluent" in comparison to the average income levels in Romania.
- **Inequality Indicator:** If the incomes of all citizens increase at the same rate, the relative poverty rate remains unchanged. It decreases only if the incomes of the poor grow at a faster pace than those of the middle class.
- **Social Exclusion:** This is the primary consequence of the phenomenon. Relative poverty implies an inability to afford an internet subscription, cinema outings, or clothing similar to that of one's peers, ultimately leading to social isolation and marginalization.

Relative poverty functions as an indicator of social cohesion. If a country's economy grows, but the benefits accrue only to the wealthy, the relative poverty rate will increase, even if the living standards of the poor remain constant in absolute terms

## 4. Poverty in Romania and Social Welfare System Intervention

Poverty in Romania represents a complex contemporary challenge, as the country consistently records one of the highest rates of risk of poverty and social exclusion within the European Union, particularly in rural areas and among large families. In Romania, one's place of birth largely determines the risk of falling into poverty. Rural regions are affected by "historical poverty," which is intrinsically linked to the lack of infrastructure and formal employment opportunities. "Poverty in Romania exhibits a pronounced rural character, where the risk of poverty is more than three times higher than in major cities; this is fueled by subsistence farming and limited access to quality education and healthcare services" (Stănculescu, 2022: 64). A negative particularity of the Romanian context is that employment does not guarantee an escape from poverty, due to low wages and a high fiscal burden.

Romania faces the highest level of in-work poverty in the European Union, which indicates that wage mechanisms and the social transfer system are not sufficiently effective to ensure a decent standard of living for low-skilled workers" (Mărginean and Precupetu, 2020: 115).

Poverty in Romania tends to be self-perpetuating, as children from disadvantaged families have limited access to the resources necessary to improve their socio-economic status. Zamfir asserts that: "Material deprivation among Romanian children often transcends the monetary dimension, manifesting through a lack of adequate housing space, a balanced diet, and educational resources, which leads to a poverty trap that is difficult to break in adulthood" (2019: 142).

When discussing the phenomenon of poverty in Romania, one cannot exclude so-called "energy poverty" which, in Sinea's view: "represents a structural problem affecting over a third of households, defined by the inability to maintain an adequate indoor temperature and by the disproportionate share of utility bills relative to total disposable income" (2021: 45).

Longitudinal studies indicate that the poverty gap between urban and rural areas is not narrowing, but rather transforming into a permanent "social fracture" that compromises the future prospects of minors. According to Teşliuc, in rural Romania:"poverty is not merely a temporary state, but a stagnant living environment where 4 out of 10 children live in conditions of severe material deprivation, drastically limiting social mobility through education" (2018: 112).

This raises the question: to what extent does the state succeed in reducing poverty through social assistance? In Romania, the impact of such measures is often lower than the European Union average. The Romanian social protection system reduces the at-risk-of-poverty rate to a much lesser extent than in other EU member states, suggesting a fragmentation of benefits and a faulty targeting of the most vulnerable groups (Mihalache, 2020: 89).

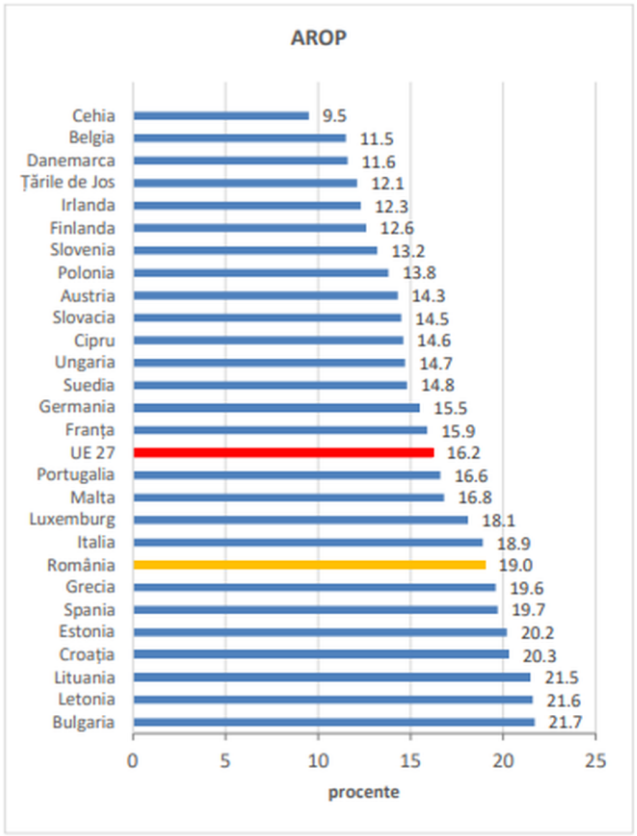
Certain ethnic or social groups face "multidimensional poverty," which includes a lack of property deeds or identity documents, implicitly excluding these groups from the official social protection system. There is a direct correlation between low educational attainment and the persistence of poverty. The lack of investment in early childhood education in Romania's disadvantaged areas creates a barrier where functional illiteracy becomes an almost certain predictor of unemployment and chronic poverty in adulthood (Păunescu and Ioniță, 2021: 156). Consequently, Romania has one of the highest early school leaving rates in the EU. For instance,

poverty in Romania's marginalized communities is exacerbated by a lack of access to the formal labor market and by spatial segregation, which limits access to basic infrastructure such as running water or sanitation (Bercu, 2022: 134).

Housing deprivation in Romania—manifested by the lack of access to running water and sanitation for nearly a quarter of the population—represents a form of structural poverty. This issue cannot be resolved solely through increases in individual income, but rather requires major public investments (Popescu, 2023: 210). Recent data indicate that food inflation has disproportionately affected low-income families, who allocate over 40% of their income to food expenses alone. The erosion of purchasing power between 2022 and 2024 has pushed new segments of the working class toward the poverty line, a phenomenon reflected in the increasing number of individuals seeking assistance from food banks or social services (Dinu, 2024: 38). According to data from the National Institute of Statistics, in 2024, 19% of Romanians faced the risk of poverty. The primary indicators were as follows: Low Income: 19% of the population lived below the poverty line (incomes below the 60% median threshold). Severe Deprivation: 17.2% of individuals suffered from severe material and social deprivation. Labor Inactivity: Approximately 615,000 people under the age of 65 (4.3%) resided in households with very low work intensity. The relative poverty rate (AROP) in Romania—estimated based on total disposable income, excluding the value of self-consumption from household resources—was 19.0% in 2024, representing a decrease of 2.1 percentage points compared to the previous year.

Poverty significantly reduces quality of life in Romania by restricting access to adequate housing, healthcare, education, employment, and essential services. Its effects extend beyond insufficient income, generating insecurity, social exclusion, poor health, limited educational opportunities, and diminished prospects for upward mobility (Otovescu, 2026). The persistence of rural, child, energy, and in-work poverty therefore reflects not only individual deprivation, but also structural inequalities that require coordinated social policies, better-targeted welfare measures, and sustained investment in disadvantaged communities.

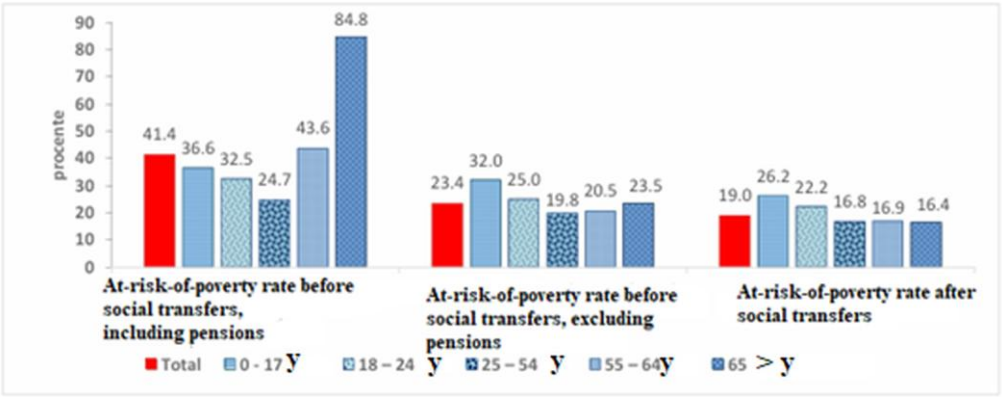
**Figure 1. At-Risk-of-Poverty Rate (AROP) in the European Union, 2024**




*Source: National Institute of Statistics, 2024: 4. https://insse.ro/cms/sites/default/files/com_presa/com_pdf/saracia_si_excluziunea_sociala_r2024.pdf*

In 2024, the at-risk-of-poverty or social exclusion rate (AROPE) stood at 27.9%, representing 5.3 million individuals (National Institute of Statistics, 2024: 2). Social transfers play a pivotal role in mitigating poverty levels. Without the provision of pensions and other social transfers, approximately 40% of the population would have fallen below the relative poverty threshold. This impact is most visible among the elderly (aged 65 and over), whose poverty rate would have reached 84.8%, compared to 43.6% for the 55-64 age group.

**Figure 2. At-Risk-of-Poverty Rate before and after Social Transfers, by Age Group, in 2024**




*Source: National Institute of Statistics, 2024: 1. https://insse.ro/cms/sites/default/files/com_presa/com_pdf/saracia_si_excluziunea_sociala_r2024.pdf*

The social transfer system, including pensions, constitutes a fundamental pillar in maintaining macroeconomic stability and social cohesion in Romania. A counterfactual analysis of the 2024 data reveals a critical dependence of the population on these redistributive mechanisms: in their absence, the at-risk-of-poverty rate would have experienced a precipitous surge, reaching an aggregate level of 41.4%. The most severe impact would have been observed among vulnerable demographic segments, particularly the elderly. Data indicate a theoretical poverty incidence of 84.8% for the 65+ age cohort and 43.6% for the 55-64 age group—figures that underscore the vital role of pensions as replacement income. Although a downward trajectory is noted in the severe material and social deprivation rate—which stood at 17.2% in 2024, reflecting a contraction of 2.6 percentage points compared to the previous fiscal year—the persistent deficit of financial resources continues to impede a significant proportion of the population from accessing the minimum standards of consumption and services essential for a decent living.

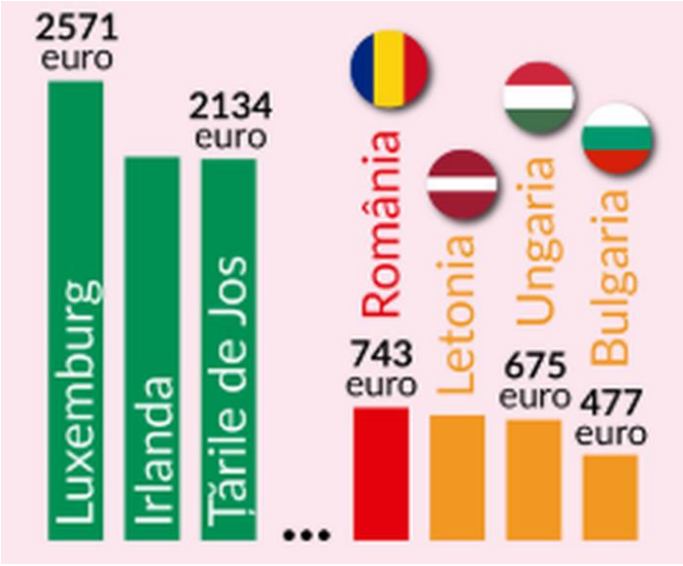
Although Romania has experienced an accelerated percentage growth in social budgets in recent years, it remains at the lower end of European rankings regarding the share of these expenditures in Gross Domestic Product (GDP). According to the Friedrich-Ebert-Stiftung Romania, based on 2023 Eurostat data, this correlates with the fact that Romania maintains one of the lowest tax-to-GDP ratios within the European Union.

### 5. Poverty and the Value of the Minimum Consumption Basket

In accordance with the legislative framework adopted in November 2024, Romania is implementing a policy to increase the guaranteed minimum income effective January 1, 2025. The gross minimum wage has been established at the 4,050 RON threshold, representing a 9.4% increase over the previous value of 3,700 RON. In net terms, an employee's disposable income will reach 2,575 RON (~515 EUR); this figure accounts for the continued application of the fiscal facility involving a 300 RON tax-deductible allowance. Over the past decade, Romania has exhibited the most

accelerated convergence rate of the minimum wage within the European Union, maintaining an average annual growth rate of 13.7%. This progression outpaces other regional emerging economies, such as Lithuania (12.3%) and Bulgaria (10.6%). Following Eurostat reports from mid-2024, Romania has been reclassified into Group 2 (comprising nations with a gross minimum wage proximal to the 1, 000 EUR threshold). This shift consolidates Romania's position among Central and South-Eastern European states, reflecting a sustained effort to align domestic remuneration standards with the European average.

**Figure 3. Comparative Analysis of Minimum Wage Levels**




*Source: Friedrich-Ebert-Stiftung Romania Office, 2024. https://romania.fes.de/ro/e/salariul-minim-in-romania-unde-ne-situam-in-raport-cu-alte-state-ue.html*

Poverty in Romania remains high, with approximately 21.2% of the population at risk of poverty in 2025, driven by low incomes and high inequality. The minimum consumption basket for a decent living for a family (two adults, two children) reached 11,370 lei per month by September 2025, driven by rising housing and food (Friedrich-Ebert-Stiftung Romania Office, 2025, https://romania.fes.de/e/comunicat-de-presa-actualizarea-cosului-minim-de-consum-pentru-un-trai-decent-2025.html).

**Table 2. Minimum Consumption Basket**

| Household type | Required monthly income (Sept. 2025) | Approx. EUR equivalent |
|---|---|---|
| Family (2 adults + 2 children) | RON 11,370 | €2,233 |
| Family (2 adults + 1 child) | RON 9,343 | €1,834 |
| Couple (2 adults, no children) | RON 7,000 | €1,374 |
| Single Adult | RON 4,322 | €850 |

*Source: Adapted from https://www.romania-insider.com/romanias-minimum-basket-decent-living-9-yoy-september-2025*

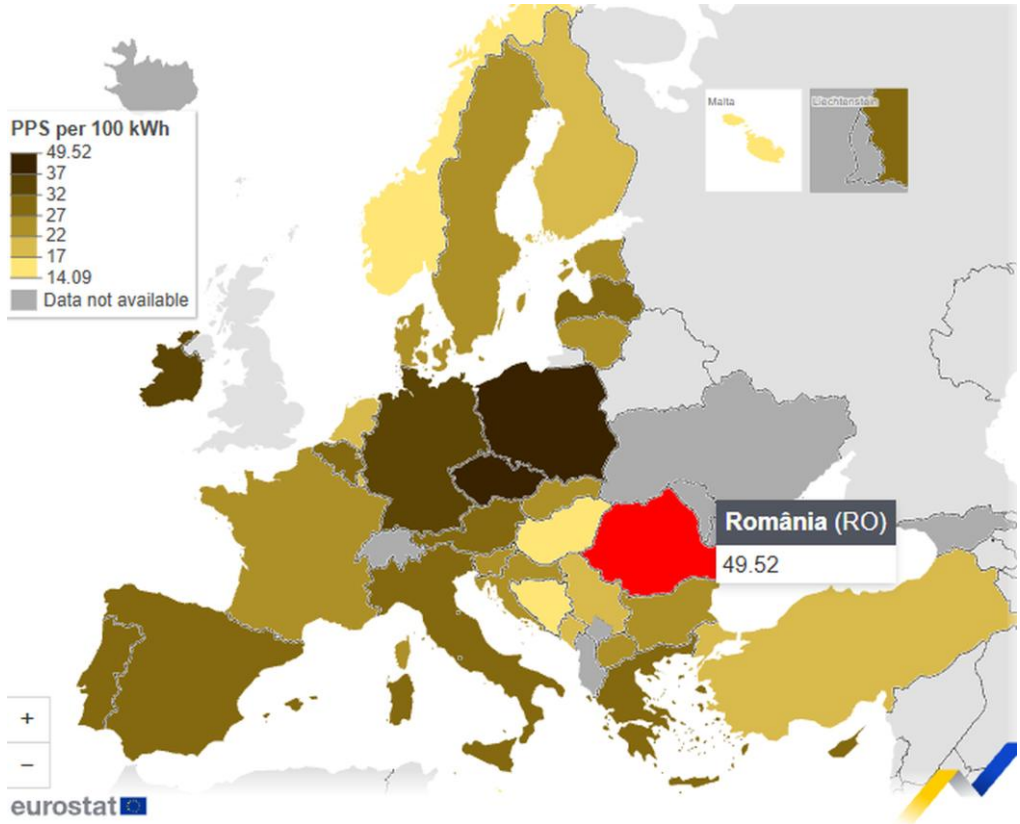
According to data from the Ministry of Labor and Social Solidarity, the national gross minimum wage is set to increase to RON 4,325 effective July 1, 2026, pursuant to Government Decision No. 146/2026. This represents a 6.8% adjustment (an absolute increase of RON 275) from the RON 4,050 level established at the beginning of the year. Following this adjustment, estimated net monthly earnings will range between RON 2,699 and RON 2,735. (Ministry of Labor and Social Solidarity, 2026, Press Release https://mmuncii.gov.ro/salariul-de-baza-minim-brut-pe-tara-garantat-in-plata-se-majoreaza/.

When correlated with the minimum consumption basket for a single person (estimated at approximately RON 4, 322 for late 2025/early 2026), the projected net minimum wage of RON 2,699 – 2,735 reveals a significant "decency gap". Currently, the net minimum wage covers only about 62-63% of the value required for a decent standard of living for a single adult. This means that a full-time employee earning the minimum wage remains nearly RON 1,600 short of the threshold defined by experts as necessary to avoid relative poverty.

While official records indicate that only 16% of labor contracts are remunerated at the minimum wage level, empirical data from the real economy suggests that approximately 2.6 million employees—representing nearly 40% of the workforce earn a maximum gross monthly income of 4,100 RON. Under legislative pressure, corporate entities have recalibrated their wage structures by migrating a significant portion of employees into the 4,050 – 4,100 RON gross bracket. Despite these nominal adjustments to comply with statutory requirements, the real income of these employees has remained virtually unchanged, indicating a marginal impact on their actual purchasing power (Cornea, 2025, Ziarul Financiar, https://www.zf.ro/profesii/misterele-salariului-minim-economie-oficial-putin-peste-16-dintre-22886215). In this context, an increasing number of Romanians are at risk of energy poverty.

According to the latest annual report from the Romanian Observatory of Energy Poverty (ORSE), energy costs are significantly impacting the quality of life for a large portion of the population. Approximately 21.1% of Romanian households fall below the poverty line after paying their energy bills. This data highlights the severe impact of energy costs on the national standard of living, especially as international market tensions continue to drive prices up. The phenomenon is particularly acute in rural areas and individual dwellings, where the added expense of LPG gas cylinders puts even greater pressure on already strained household budgets. In this context, an increasing number of Romanians are facing a state of energy vulnerability (ORSE, 2026, https://www.saracie-energetica.ro/raport-orse-2025-una-din-cinci-gospodarii-ajunge-sub-pragul-saraciei-dupa-plata-energiei/).

**Figure 4. Electricity Prices for Households, Second Half of 2025 (PPS per 100 kWh)**

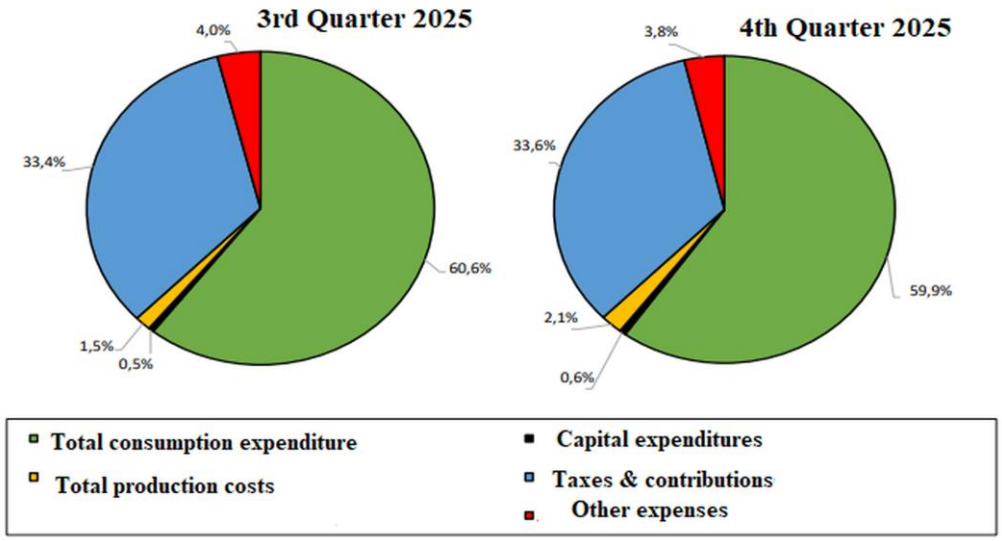



*Source: Eurostat, "EU Household Electricity Prices Stable in 2025." https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20260505-1*

According to Eurostat data, despite stable averages across the European Union, the second half of 2025 was characterized by pronounced national price volatility: while Romania (+58.6%), Austria, and Ireland experienced substantial surges, Cyprus, France, and Denmark reported significant reductions. This divergence ultimately resulted in Romania maintaining the highest electricity costs in the Union when adjusted for Purchasing Power Standards (PPS).

The convergence of Romania's 58.6% electricity price explosion with its ranking as the most expensive provider in the EU relative to PPS underscores a severe energy poverty risk. Within a household expenditure framework where 93% of resources are already locked into fixed consumption and fiscal obligations, such price volatility functions as a regressive tax, further eroding the diminishing disposable income of the most vulnerable population segments

**Figure 5. Structure of Total Household Expenditure**




*Source: National Institute of Statistics, 2026.*
*https://insse.ro/cms/sites/default/files/com_presa/com_pdf/abf_tr4r25.pdf*

The analysis of the total household expenditure structure for the third and fourth quarters of 2025 reveals a configuration heavily dominated by consumption expenditures (59.9% – 60.6%) and fiscal obligations in the form of taxes and contributions (33.4% – 33.6%). These two categories combined account for over 93% of total allocations, thereby restricting investment capacity (capital expenditures) to a marginal level of less than 1%. When over 93% of expenditures are allocated toward current consumption and taxes, households possess near-zero budgetary flexibility. Consequently, any external economic shock—such as rising utility prices, food inflation, or unforeseen health issues—cannot be absorbed through budgetary reallocation, leading directly to material deprivation. Absent savings or investments, households are unable to generate passive income or establish emergency funds, remaining only one income source away from the poverty threshold. The fact that taxes and contributions account for 33.6% of total expenditures constitutes a major barrier for low-income households. While consumption may be adjusted through the purchase of lower-cost goods, fiscal obligations to the state remain fixed and prioritized, thereby diminishing the disposable income available for basic necessities.

In the absence of emergency funds or passive income streams, any future economic crisis—such as a recession or galloping inflation—will rapidly transition these low-income households into the category of extreme poverty. The population's capacity for economic resilience diminishes proportionally with the increase in budgetary rigidity

## 6. Conclusion and Discussion

Poverty in Romania does not constitute a transient phase but rather a stagnant living environment. The prevailing economic burden is not a product of discretionary spending but of a systemic framework in which the high costs of essential goods and heavy taxation preclude opportunities for savings or investment, effectively trapping a segment of the population in a subsistence economy. This is not merely a matter of temporary financial hardship; it represents an economic architecture that compels households to operate in a state of permanent crisis. Approximately 93.5% of household income is immediately absorbed by two unavoidable categories: consumption (59.9%) and taxes or social contributions (33.6%). In this model, luxury or elective expenditures are virtually non-existent; households do not choose to forgo savings but are forced by price structures and fiscal burdens to exhaust all resources simply to maintain a minimum standard of living. Even following scheduled adjustments for 2025 and 2026, the net minimum wage will cover only 62–63% of the amount required for a single adult to maintain a decent standard of living, which is estimated at 4,322 RON. Romania records the highest rate in the European Union of individuals who remain below the poverty threshold despite full-time employment. Consequently, labor ceases to be a vehicle for social mobility and serves merely as a mechanism for basic survival. One in five households (21.1%) falls below the poverty line immediately upon settling utility invoices. This "forced allocation" of resources toward energy costs drains liquidity that could otherwise support education, healthcare, or professional development. Social mobility becomes a theoretical abstraction, and subsistence remains the only realistic objective. While fiscal relief offers a predictable path to increasing net income, the energy burden remains the primary driver of sudden deprivation. Given that Romania is an outlier regarding energy costs relative to purchasing power (49.52 PPS), a targeted intervention in utility prices may serve as the necessary "emergency brake" to prevent households from slipping below the subsistence line.

Ultimately, poverty in Romania remains a major structural challenge, with national indicators for the risk of poverty and social exclusion (AROPE) maintaining alarming levels within the European hierarchy, particularly among large families and rural populations burdened by a systemic deficit of material capital.

**References:**


1. Bercu, A. M. (2022). Managementul serviciilor sociale şi incluziunea grupurilor vulnerabile. Editura Universităţii „Alexandru Ioan Cuza”.
2. Cornea, R. (2025). Misterele salariului minim pe economie. Ziarul Financiar. Available at: https://www.zf.ro/profesii/misterele-salariului-minim-economie-oficial-putin-peste-16-dintre-22886215
3. Dinu, M. (2024). Economia de criză şi impactul social asupra gospodăriilor. Editura Economică.
4. Dumitrescu, R. (2026). Romania’s minimum basket for a decent living up 9% YoY in September 2025. Romania Insider. Available at: https://www.romania-insider.com/romanias-minimum-basket-decent-living-9-yoy-september-2025
5. Eurostat. (2026). EU household electricity prices stable in 2025. Available at: https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20260505-1
6. Friedrich-Ebert-Stiftung Romania Office. (2024). Salariul minim în România: unde ne situăm în raport cu alte state UE. Available at: https://romania.fes.de/ro/e/salariul-minim-in-romania-unde-ne-situam-in-raport-cu-alte-state-ue.html
7. Friedrich-Ebert-Stiftung Romania Office. (2025). Press release: Update of the minimum consumption basket for a decent living standard 2025. Available at: https://romania.fes.de/e/comunicat-de-presa-actualizarea-cosului-minim-de-consum-pentru-un-trai-decent-2025.html
8. Mărginean, I., and Precupetu, I. (2020). Calitatea vieţii în România: Provocări şi direcţii de dezvoltare. Editura Academiei Române.
9. Mărginean, I. (2021). Indicatorii sociali şi calitatea vieţii în România contemporană. Editura Academiei Române.
10. Mihalache, F. (2020). Statul social român în tranziţie: Între retorică şi realitate. Editura Expert.
11. Ministry of Labor and Social Solidarity. (2026). Press release: Salariul de bază minim brut pe ţară garantat în plată se majorează la 4.325 lei lunar, începând cu data de 1 iulie 2026. Available at: https://mmuncii.gov.ro/salariul-de-baza-minim-brut-pe-tara-garantat-in-plata-se-majoreaza/
12. National Institute of Statistics. (2024). În anul 2024, aproape unul din cinci români era afectat de sărăcie. Available at: https://insse.ro/cms/sites/default/files/com_presa/com_pdf/saracia_si_excluziunea_sociala_r2024.pdf
13. National Institute of Statistics. (2026). În trimestrul IV 2025, o gospodărie a avut, în medie, venituri în valoare de 9.454 lei şi cheltuieli de 8.075 lei. Available at: https://insse.ro/cms/sites/default/files/com_presa/com_pdf/abf_tr4r25.pdf

14. Observatory of Energy Poverty (ORSE). (2026). Raport ORSE 2025: Una din cinci gospodării ajunge sub pragul sărăciei după plata energiei. Available at: https://www.saracie-energetica.ro/raport-orse-2025-una-din-cinci-gospodarii-ajunge-sub-pragul-saraciei-dupa-plata-energiei/
15. Otovescu, M.C. (2026). Quality of Life. In Otovescu, D. and Otovescu, C. (eds.), *Contemporary Sociology: Fields of Study and Representative Concepts*, Vol. 1, 271–314. Craiova: Beladi.
16. Păunescu, C., and Ioniță, M. (2021). Educația și mobilitatea socială: Capcanele sistemului românesc. Editura Universitară.
17. Popescu, C., and Ionescu, A. (2023). Economia globală și combaterea deprivării materiale. Editura Economică.
18. Popescu, C. (2023). Dreptul securității sociale: Curs universitar. Editura Hamangiu.
19. Sinea, A. (2021). Sărăcia energetică în România: Perspective politice și sociale. Editura Presa Universitară Clujeană.
20. Stănculescu, M. S. (2022). Analiza incluziunii sociale și a sărăciei în România. Editura Polirom.
21. Stoica, L. (2020). Asistența socială și politicile de reducere a sărăciei. Editura Polirom.
22. Teșliuc, E., Grigoraș, V., and Stănculescu, M. S. (2018). Diagnosticarea sărăciei în România. Editura Băncii Mondiale.
23. Zamfir, E. (2019). Politici sociale în România: 1990–2019. Editura Academiei Române.

# Actions vs Expectations. Gender-Based Analysis of the Impact of Collective Thinking on Personal Behavior and Identity

**Mario-Beniamin BĂLAN**
PhD Graduate, West University of Timişoara (Romania)
Email: mario.balan04@e-uvt.ro

**Atalia ONIȚIU**
Lecturer, PhD, West University of Timişoara (Romania)
Email: atalia.onitiu@e-uvt.ro

***Abstract:*** *This paper explores the way individuals construct and express their gender identity within a social context shaped by norms, expectations, and early socialization. Drawing from theoretical frameworks such as social constructivism, gender schema theory, and feminist contributions, the study emphasizes the idea that gender is negotiated through personal experiences and collective pressures. The research was conducted using a quantitative method, based on a structured questionnaire administered to a non-probabilistic sample of 104 participants. The results support the view of gender as a socially constructed and dynamic identity but underline the link between gender and sex. Although some hypotheses regarding the impact of social expectations on gender expression were not confirmed, the findings underline the complexity and variability of gender experience among respondents. Younger participants, as well as those with exposure to feminist ideas, showed greater openness to understanding gender as a flexible and socially influenced identity. However, the absence of significant correlations in certain areas suggests that social pressure may act in subtler or internalized ways, not always detectable through quantitative tools. This research highlights the tension between social conformity and authentic gender expression, and shows the need for further research into how individuals navigate societal expectations while shaping their personal identities. Beyond its academic contribution, the study also serves as a reflective process, underscoring that gender identity is not a static condition, but a path shaped by both personal agency and collective influence.*

***Keywords****: gender identity; sex; social expectations; behavior; socialization*

## 1. Introduction

During the development of sociology as a science, emerged the idea that society, through the process of socialization - whether primary or secondary - directly and significantly influences both behavior and the perception of oneself and the environment. This perspective was developed by sociologists such as Emile Durkheim and Talcott Parsons. However, the present study has as its starting point the theory of the dramatic model in society developed by Erving Goffman (2007), on the role or status established by society and the implications these have on the behavior and self-perception of the individual.

Through the lens of gender studies, the research is conceptualized and primarily aimed at analysing whether collective thinking influences individual behavior and perceptions related to gender, and secondly, it examines the ways in which this relationship of "*expectations and actions*" is achieved, in other words, drawing a line between what people choose to do and what they feel they should do according to internalized social expectations.

In addition to its importance for the field of sociology, the subject matter of the study is topical and reflects a part of the social reality. In society, collective norms shape not only the behaviors of individuals, but also the way in which they come to perceive themselves. Social and cultural expectations can profoundly influence gender identity, personal and professional choices, but also the way in which the individual negotiates his or her place in society.

## 2. Theoretical Framework

In every society there are and have been distinctions between men and women, this being a feature of human culture. In every unit of human organization there are and have been different duties, occupations and expectations based on the criterion of sex, specific to adult life, that of childhood or that anticipate those of adulthood, that is, values socialized early in order to prepare children or young people to be adults who share the values of the society to which they belong. Not only are boys and girls expected to acquire sex-specific skills, but they are also expected to have or develop sex-specific self-concepts and personality traits – to be masculine or feminine, as these are defined by the respective culture (Barry, Bacon, and Child, 1957).

These differences between the sexes, reflected in behaviors, attitudes and social roles, are organized around the concept of gender. Unlike biological sex, which refers to the anatomical and physiological differences between men and women, gender is a social construct that designates the set of norms, behaviors, and attributes considered appropriate for women and men in a given culture (Eagly and Wood, 2012).

In this context, terms such as gender identity, gender role, gender stereotypes, or gender socialization become essential for understanding how individuals develop their sense of self in relation to these expectations. Gender identity reflects a person's deep sense of being male, female, or something else, while gender role refers to expected social behaviors and attributes. Gender stereotypes, often internalized through early socialization processes, can profoundly influence individuals' personal and professional trajectories, shaping their perceptions of what is "normal" or "acceptable" for their gender.

The study of gender has gone through several stages of understanding throughout the 20th century, moving from individual psychological perspectives to more complex sociological and cultural approaches. The first attempts to explain gender differences can be found in Freudian psychoanalysis, formulated in 1905, in which Sigmund Freud considered gender identity to be a result of the Oedipal identification process and unconscious conflicts in childhood, emphasizing psychosexual development. Although contested, Freudian ideas influenced later thinking, paving the way for the analysis of identity beyond biological sex. In the second half of the 20th century, researchers such as Simone de Beauvoir, in her work "*The Second Sex*" (1949), questioned the "given" nature of femininity, stating the famous phrase: "*You are not born a woman, you become a woman*", thus paving the way for existentialist and constructivist feminist theories.

Since the 1970s, materialist feminist and socialization theories have emphasized the role that education, institutions, and cultural norms play in the formation of gender identity, followed by poststructuralist perspectives that have completely reformulated its understanding. In recent decades, research such as that of Judith Butler, in "*Gender Trouble*" (1990), or "*Doing Gender*" (1987) by C. West and D.

Zimmerman, has defined gender as a discursive and performative construction, proposing that gender is not a fixed attribute, but a repetitive act that produces and reproduces cultural norms related to masculinity and femininity. Zimmerman and West spoke of gender as an "achievement" of each individual to elaborate on this proposition, the authors suggesting, from the outset, the need to observe important but often neglected distinctions between sex, sex category, and gender. In a subsequent study, conducted by Zimmerman and West (2009), the phrase "doing gender" is expanded. In addition to strengthening and defending the concept with empirical studies, the idea of "doing difference" is introduced, an idea that offers new perspectives that support the fact that gender is a continuous and sustained process. "Doing difference" refers to the different ways in which gender can be understood and applied, depending on social class, race or cultural background. This concept supports the original theory from 1987.

Sex is a classification made by applying socially accepted biological criteria that allow a person to be classified as female or male. These criteria may include the appearance of the genitals at birth or the chromosomal pattern before birth, but the two may sometimes not coincide.

The sex category is assigned based on these biological criteria, but in everyday life membership in a sex category is supported by socially required identifying manifestations – behaviors, appearances, or expressions that visibly signal membership in one of the two categories. In this sense, the sex category is assumed to reflect biological sex and often functions as a substitute for it in social contexts, although the two concepts can exist independently – a person can claim a sex category even in the absence of the associated biological criteria.

By contrast, gender is defined as the activity through which individuals manage their behaviors in a specific context, in accordance with normative expectations related to attitudes and actions considered appropriate for the claimed sex category. Gendered actions stem from and reinforce membership in a particular sex category.

Today, gender studies is a key interdisciplinary field, where biology, culture, language, and power structures interact to shape identity. Moreover, contemporary studies also integrate biological and neuropsychological dimensions, demonstrating the plasticity of gender identity and the explanatory limits of biological determinism (Fine, 2010).

Gender schema theory was proposed by Bem (1981) and supports the existence of "mental structures", a network of associations that aims to organize and influence a person's perception. Gender schema theory introduces the concept of gender typing, which refers to the process by which a child adopts behaviors, attitudes, and roles considered appropriate for his or her biological sex (Bem, 1981: 354). Thus, each newly acquired information is captured and filtered through the schema that each individual forms. In this sense, gender typing is a phenomenon derived from gender-based schematic processing. Their actions and nature end up being passed through a set of associations and connections derived from gender perception.

As children grow and come to understand the gender structure schema, they learn to make the connection between characteristics or traits and their corresponding sex, and to attribute to themselves the traits that match their sex. Through this mechanism, children come to internalize not only explicit social rules, but also subtle expectations related to behaviors considered appropriate for their gender.

The gender schema thus becomes a filter through which social realities are interpreted, influencing not only perceptions of others, but also the construction of one's own identity. This theory argues that gender typification is not a passive process, but an active one, in which the child selects and values relevant information according to the already formed schema. In this way, gender stereotypes are not only learned, but also reproduced, thus maintaining the symbolic order of the culture in which the individual develops. This explanatory framework can provide a solid basis for understanding how gender norms affect the self-perception and behavior of individuals in various contexts, from education to professional life.

Social constructivists argue that gender is not equivalent to biological sex. Instead, gender is an organizing principle of the social order, which divides individuals into two major categories: "men" and "women". These categories are associated with different expectations, and individuals are treated differently, thus developing different traits. From this perspective, gender differences are explained by social processes and hierarchical power imbalances between women and men, which justify their historical and cultural variations (Lorber, 2018).

The phrase "*Throughout our lives, we dance a gendered dance, and through the dance we are gendered*" (Loeber, 2018: 4) puts the process of defining and self-defining gender in an easy-to-understand context, a process that is an invisible choreography, learned and practiced through everyday interactions, social norms, and cultural expectations. This dance metaphor suggests a continuous, rhythmic movement, in which gestures, choices, and behaviors are guided by a social score: gender norms. We are not born with the steps of this dance, but we gradually learn them, and through this dance we become, in the eyes of society and in our own eyes, women or men. Social constructivists argue that gender is not an immutable biological given, but a repeated performance (Butler, 1990), which thus acquires the illusion of stability. Thus, we do not just dance gender – but, through dancing, we become gender. Berger and Luckmann (1966) argue that the social world is internalized through socialization, becoming part of the individual's consciousness. Thus, being "masculine" or "feminine" does not reflect intrinsic traits, but roles learned and reinforced through education, the media, religion, and other social institutions. Constructivism argues that these roles are transmitted and maintained to ensure the cohesion and functioning of society, but also that they can be contested and changed. From this perspective, gender identity is fluid, contextual, and negotiable, and traits considered "natural" are in fact the result of a complex and persistent social process.

The dramaturgical model proposed by Erving Goffman in his work "*Everyday Life as Performance*" (2007) offers a metaphor that helps to understand how individuals construct and express their identity in social contexts. According to this perspective, social life is comparable to a theater stage, in which individuals play roles according to the expectations of the audience and socially accepted norms. Thus, identity is not something fixed, but is shaped performatively, through repeated and negotiated interactions. Applied to gender studies, this model highlights the fact that gender is a performance, a continuous staging of cultural norms about femininity and masculinity. This idea is related to the theories of social constructivism.

Goffman introduces the concept of "gender display", that can be explained as follows: if gender is defined as culturally established correlations of sex (either as a result of biology or learning), then gender display refers to conventionalized

representations of these correlations. These gender expressions may provide clues about the fundamental, deep dimensions of femininity and masculinity, but, in Goffman's view, they are optional representations. Masculine courtesies may or may not be offered, and if offered, they may or may not be accepted. These behaviors are specific to both sex and to societal conventions about gender and how it can be divided. For example, a man may show that he is "masculine" by being tough or protective, and a woman by being gentle or caring. But these behaviors are not necessarily reflections of a biological essence—they are learned and played out as a role.

Goffman's framing assumes a certain optional side to gender manifestation, as if it is not a perpetual process and can be easily abandoned, being only a mask or an interpretation. West and Zimmerman (1987) instead support the discursive or performative character of gender, but also the repetitive, volatile and continuous nature of gender manifestation.

The functionalist perspective on gender, specific to classical sociological theory, argues that the differentiation of gender roles is necessary for the proper functioning and stability of society. Talcott Parsons, one of the central figures of structural functionalism, formulated the idea that gender roles are distributed complementary within the family: men take on instrumental roles, focused on providing resources and rational decisions, while women fulfill expressive roles, focused on emotional support and care for family members (Parsons and Bales, 1955). This division of labor is seen as socially efficient, contributing to the balance of social institutions and the internalization of social expectations among individuals. In the context of the present paper, the functionalist view can be useful in understanding how certain gender norms and behaviors have been historically naturalized through the idea of "social necessity". Although this paradigm is now contested, it provides an important explanatory framework for analyzing how collective gender expectations can influence the development of personal identity and the behavior of individuals according to their assigned sex.

Symbolic interactionism in the context of explaining gender dynamics is related to constructivism, but emphasizes face-to-face interactions and the symbolic meanings we assign to gestures, expressions, and behaviors in everyday life. In this paradigm, gender is seen as a constant process of symbolic negotiation, in which individuals affirm or adjust their identity depending on the reactions of others. Erving Goffman, through his theories, supports this perspective. Thus, symbolic interactionism not only explains how gender is "made," but also why it is maintained and validated through social reaction.

Conflict theory offers a critical perspective on gender relations, analyzing how they reflect and perpetuate power imbalances in society. From this perspective, gender is not just a set of learned social roles, but a dimension of social structure that contributes to maintaining inequalities between women and men. According to conflict theorists, such as Karl Marx and later Marxist feminist authors, gender expectations are shaped in such a way as to support the interests of the dominant group – in most cases, men – and to ensure the reproduction of a hierarchical system (Lorber, 1994). Collective expectations regarding the "appropriate" behaviors for each gender serve to justify the unequal distribution of resources, opportunities and power in society (Connell, 2002). In this sense, gender differences are not natural or neutral, but constructed and maintained to support the control and dominance of one social

category over another. Conflict theory thus allows for a critical understanding of how individual actions and identities are influenced by structural tensions and the struggle for resources and recognition.

An essential and complementary contribution to the understanding of gender identity and roles is made by the social learning theory, formulated by Albert Bandura (1977). This theory complements the structural or symbolic explanations offered by sociological paradigms by emphasizing the processes of observation, imitation and reward in the formation of gender behaviors. According to this perspective, children learn to behave "like boys" or "like girls" not only through formal socialization or cultural norms, but also by observing behavioral models provided by the family, the media or the social environment. Thus, the social learning theory brings a micro-explanatory level of the way in which individuals internalize gender expectations, reinforcing the idea that gender identity is not a biological given, but a result of experience and interaction with the environment. In complementarity with constructivist or symbolic interaction theories, this approach highlights the subtle dynamics through which social norms become recurrent individual behaviors, supported by external rewards or social acceptance.

Feminism has fundamentally transformed the understanding of gender, demonstrating that the differences between women and men are not natural or biologically determined, but products of social, cultural and political processes. Thus, feminism claims that gender is a social construction. According to this principle, the idea that a person feels belonging to the male or female gender in a subjective and personal way without any influence from society and the norms constructed by it is contested (Thalos, 2005). We only have direct access to our own feelings, and even these are shaped by the language and cultural norms that surround us. The emotions and behaviors that we feel only take shape through the lens of the categories that society makes available to us. If that society teaches us to interpret the world through the prism of rigid norms, based on anatomy – on the differences between male and female organs – then it is not what is "natural" or "essential" that guides our identity, but the invisible rules of the social game. We discover ourselves not in an immutable inner truth, but in the mirrors that culture places before us (Riley-Cooper, 2017).

Van Breen, Spears, Kuppens and de Lemus (2017) propose that gender identity is a complex construct, consisting of at least two interrelated but distinct dimensions. The first dimension is identification with women, which reflects emotional and psychological affiliation with the female group and involves the internalization of traits, values, and norms traditionally associated with femininity. This identification is based on early socialization processes and cultural models that define what it means to "be a woman" in a given social context. The second dimension is feminist identification, a form of affiliation with a social and political identity that challenges traditional norms and highlights gender inequalities. This dimension involves not only the acceptance of shared values, but also a commitment to structural and social change. It is a politicized identity, reflecting not only solidarity with other women, but also a critical awareness of gender power relations.

Therefore, understanding gender identity requires an analysis that considers both the psychological and relational dimension (identification with women) and the ideological and activist dimension (identification with feminists). The two dimensions are not always overlapping – a person can identify strongly with the women's group

without considering themselves a feminist, and vice versa. This distinction provides a useful analytical framework for understanding variations in the expression of gender identity and how individuals simultaneously negotiate group membership and positioning themselves against dominant social norms. The results highlight that these two dimensions are relatively independent, and their combination shapes how individuals react to various gender issues. For example, women with high identification with both women and feminists (called "dual identifiers") are more likely to support radical collective action and to criticize gender stereotypes.

Given the multitude of theoretical and conceptual perspectives on gender, it becomes evident that this construct of personal and collective gender identity and the way in which they are connected is related to context or social, cultural and psychological factors. In this sense, gender cannot be understood as a fixed category, but rather as a dynamic process, influenced by social expectations, internalized gender norms and everyday interactional experiences. It is precisely this complexity that justifies the approach of a research that investigates the way in which individuals relate to their own gender identity, to collective norms and to their influence on personal behavior.

## 3. Methods

The methodological design chosen in this chapter is quantitative, aiming to explore the relationship between individual perceptions of gender and the influence of collective thinking on personal behavior and identity. This approach was chosen due to the ability of the quantitative method to generate standardized, comparable and easily statistically analyzed data, especially in the context of a topic that involves psychosocial dimensions such as gender identity and social pressure. The choice of this methodological design is motivated by the need to capture the nuances of the relationship between social expectations and the way in which individuals assume or negotiate their own gender identity in a social context defined by dominant norms and models.

The main purpose of this research is to analyze the relationship between collective expectations related to gender and their influence on personal behavior and identity. The approach pursues four research objectives, namely:

Ob.1: Investigating how individuals perceive their gender identity and how authentic it is in relation to social expression.

Ob.2: Exploring individuals' perceptions of gender as a fixed or flexible construct

Ob.3: Analyzing how social expectations influence personal choices, behaviors, and self-evaluation in a social context and within the close circle.

Ob.4: Observing the degree to which currents such as feminism or egalitarian ideologies influence participants' perceptions of gender expression.

Based on these objectives, the following research hypotheses were formulated:

H.1: The expression of gender identity is significantly influenced by the pressure to conform to internalized gender norms.

H.2: Respondents perceive gender as a construct largely shaped by social norms.

H.3: There is a direct relationship between gender perceptions and adopted behaviors, such as avoiding certain actions or conforming to gender expectations.

H.4: Participants who know and adhere to trends such as feminism demonstrate a more authentic gender expression and are less influenced by traditional pressures.

H.5: Respondents believe that their immediate social environment (family, friends) influences their identity and relationship to gender.

The research instrument used in this paper was a questionnaire specifically developed to investigate the relationship between collective gender expectations and their influence on personal identity and behavior. The questionnaire items were constructed based on theoretical concepts grounded in the specialized literature, such as gender identity, gender roles, gender socialization and cultural norms. The questions were formulated in such a way as to be clear, accessible and value-neutral, avoiding inducing an answer. In addition, a Likert scale (from 1 to 7) was used to assess the intensity of perceptions and attitudes, allowing for a detailed statistical analysis. The questionnaire follows three major directions: identification of the gender profile and the degree of its internalization (part I), perception of social norms regarding gender and on the close collective (part II), respectively the impact of collective perceptions on the behavior and identity construction of the individual (part III).

The target population for this research is young people between the ages of 18 and 30, given that this age group is in an active process of (re)defining identity and is exposed to modern gender-related social dynamics. The choice of this demographic category was motivated by its relevance to the research topic, as young people are simultaneously the product of traditional socialization and emerging cultural currents, which makes them ideal participants for studying the tension between collective expectations and personal expression.

Given the exploratory nature of the research and the available resources, a non-probabilistic, convenience sampling method was used, complemented by the "snowball" method. Participants were initially selected from the researcher's personal and professional circle, and then they were encouraged to distribute the questionnaire to other people who fit the demographic criteria. This method was considered suitable for accessing a sample varied in terms of background, gender, education level and gender-related opinions.

Data were collected online, during June 2025, the questionnaire being distributed through social media platforms (Facebook, Instagram), discussion groups and personal networks. This collection method was chosen for its speed and accessibility, but also to encourage honest responses, under conditions of anonymity. It allowed the participation of respondents from different localities in Romania, however, with a concentration in the city of Timişoara and Timiş County.

## 4. Limitations and Difficulties

Among the main limitations of the research is the lack of representativeness of the sample. A difficulty was related to the balanced formulation of the questions, so as not to suggest directions of response, especially in the case of abstract concepts such as gender identity or social pressure.

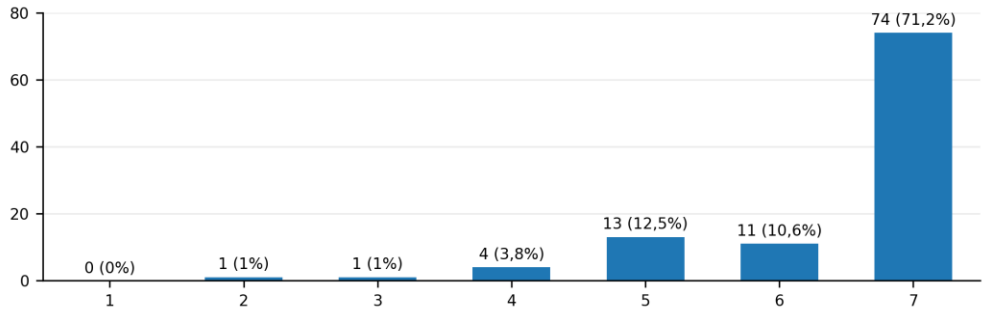
## 5. Results and Discussions

Of the 104 respondents, 52 are between 18 and 24 years of age (50%), 29 between 25 and 34 years of age (27.9%), and 23 are over 35 years of age (22.1%). The proportion of female respondents is higher than the proportion of male respondents,

namely 63 women (60.6%) and 41 men (39.4%). When it comes to the area of residence, 82 out of 104 respondents (78.8%) live in urban areas, and the remaining 22 (21.2%) live in rural areas. The level of education of the respondents is divided into 4 levels: secondary education with a single respondent (0.96%), high school education, where the majority is distinguished with 60 out of 104 answers (57.7), vocational or post-secondary school with a percentage of 5.8% (6 people) and university studies with 37 respondents (weight of 35.6%). From this point of view, the sample reflects the anticipated characteristics of the target population, being a predictable and relevant one for the purpose of the research.

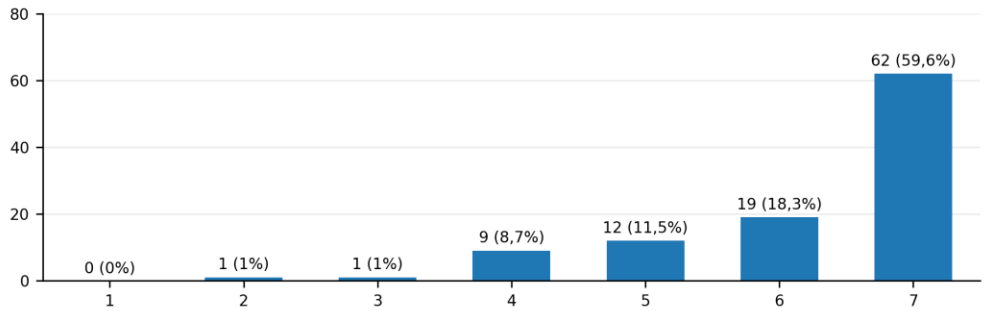
The gender identity of the respondents is outlined by the first set of questions (P1.1-P1.5). The tendency of the respondents to have a well-established gender identity that corresponds to the biological sex, as well as the tendency to identify with the gender identity through behavior, is observed.

**Figure 1. On a scale from 1 to 7, to what extent do you feel that the gender you identify with authentically reflects who you are?**




*Source: Authors' survey data (June 2025).*

**Figure 2. On a scale from 1 to 7, how authentic is your gender expression compared to how you feel internally?**




*Source: Authors' survey data (June 2025).*

To investigate how individuals perceive their gender identity and how authentic it is in relation to social expression, we formulated two research hypotheses. The first hypothesis ("Gender identity expression is significantly influenced by the pressure to conform to internalized gender norms") can be tested through a correlation analysis between item P1.1 ("On a scale from 1 to 7, how much do you feel that the gender you identify with authentically expresses who you are?") and P2.4 ("On a scale from 1 to 7, how free do you feel that you are to express your gender as you feel, without fear of being judged?"). Following the Kolmogorov-Smirnov normality test, both variables were found to be non-normally distributed, which is why Spearman correlation analysis was applied. The result obtained (correlation coefficient rho=0.351 corresponding to a medium level of correlation and significance threshold p=0.000) indicates the existence of a moderate positive correlation, statistically significant. In other words, as respondents feel that their gender identity authentically reflects who they are, the feeling of freedom in expressing this identity, without fear of judgment, also increases.

To verify hypothesis 3, "There is a direct relationship between gender-related perceptions and adopted behaviors, such as avoiding certain actions or conforming to gender expectations", we conducted a statistical correlation between items P1.1. "On a scale from 1 to 7, how much do you feel that the gender you identify with authentically expresses who you are?" and I.6. "Have you ever avoided doing something you wanted to do because of the fear that it did not match your gender?" Both variables were subjected to the one sample Kolmogorov Smirnov test, the result being that both are not normally distributed. Consequently, we resorted to a Spearman correlation analysis. After performing the analysis, we can conclude that there is a statistically significant correlation between the two variables, the significance threshold being equal to p=0.001, and the correlation coefficient rho=-0.328, a negative coefficient that represents a medium degree of correlation. Following this analysis, we can state that, as the level of identification between gender and individual decreases, the possibility increases that the respondent will do something they do not want to do due to the fear that they do not match the gender they perceive.

This trend is complementary to the positive result obtained in the correlation analysis between P1.1 and P2.4, where it was observed that people who perceive more freedom in gender expression also tend to have a more authentic gender identity. The two results, although from different directions (one negative, the other positive), together draw a coherent conclusion: authentic gender expression is deeply influenced by the perceived social context — either as a space for freedom or as pressure to conform.

To fulfill the second research objective ("exploiting individuals' perceptions of gender as a fixed or flexible construct"), we first resorted to analyzing the weights of the answers for item P2.3: "How do you think gender is perceived in today's society?" This item is qualitative in nature, with 3 predefined answer options: "1. as a fixed construct, linked to biological sex; 2. as a flexible spectrum, dependent on identity; 3. as a controversial concept". The majority of the response option "1. as a fixed construct, linked to biological sex", is 44.2%. Of the sample of respondents, only 16.3% consider that gender is perceived in society as a flexible spectrum, dependent on identity, the analysis of the responses reinforcing the traditionalist character of the gender perspective among the respondents.

To analyze how social expectations influence personal choices, behaviors, and self-evaluation in a social context and within the close circle, we formulated research hypothesis number 5: "Respondents believe that the close social environment (family, friends) influences their identity and relationship to gender". Following a bivariate correlation test between variables P1.3 "On a scale from 1 to 7, how authentic is your gender expression compared to what you feel inside" and P2.5 "To what extent do you consider that in your social circle (family, friends, colleagues) there are clear expectations related to the appropriate behaviors for men and women?" (the distribution of both variables was tested with the one sample Kolmogorov Smirnov test, the variables not being normally distributed) it can be concluded that there is no statistical correlation between the two variables, since the significance threshold p=0.095. In other words, there are no statistically significant relationships between the authenticity of gender expression and the pressures or expectations of the social space close to the individual. Therefore, the relationship between social pressures and the exposure of gender identity is more complex and cannot be reduced to a direct correlation; it may be about the social structure and the impact of a society with largely traditionalist principles, or individual resistance to the norm

In relation to this hypothesis, we investigated the relationship between I3. "How often do you feel that you have to change your behavior to adapt to society's expectations related to your gender?" and P2.5. "To what extent do you consider that in your social circle (family, friends, colleagues) there are clear expectations related to the behaviors appropriate for men and women?". We resorted to a Spearman correlation analysis, since the distributions are not normal according to the Kolmogorov-Smirnov test. The result indicates that there is no statistically significant correlation between the two variables ($p=0.286$, $p>0.05$). The lack of correlation may indicate the idea that, although respondents recognize the existence of clear expectations in their social circle, these do not directly influence the frequency with which they change their behavior to adapt to these norms. This result may suggest that the mere perception of gender norms in the immediate environment is not sufficient to directly influence gender-expressed behavior, which highlights the complexity of identity adaptation mechanisms.

To investigate to what extent currents such as feminism or egalitarian ideologies influence participants' perceptions of gender expression, we formulated hypothesis 4 of the research ("participants who know and adhere to currents such as feminism manifest a more authentic gender expression and are less influenced by traditional pressures"). To test this, we resorted to a correlation analysis between items P2.4. "On a scale from 1 to 7, how free do you feel you are to express your gender as you feel, without fear of being judged?" and I4. "Do you agree with the following statement: Feminism and recent social movements have encouraged freedom of expression of gender identity, reducing the pressure to conform to traditional roles?" The two variables are scalar from 1 to 7 and were subjected to the one sample Kolmogorov Smirnov test, the result being that both are not normally distributed. Following the Spearman correlation analysis, it can be concluded that there is no statistically significant correlation between the 2 indicators, the significance threshold has a value equal to $p=0.518$, and the Spearman correlation coefficient has a value of $rho=0.064$, which represents an almost non-existent degree of correlation. In other words, there is no statistically established relationship between respondents who

know and align themselves with currents such as feminism and a high degree of freedom in expressing gender identity. This lack of statistical correlation does not, however, deny the importance of social movements in shaping discourses about gender. Rather, it suggests that the internalization of these ideas is not automatically reflected in the feeling of personal freedom – which may indicate a rupture between the conceptual understanding of social change and the lived experience of identity.

## 6. Conclusions

This paper aimed to investigate how individuals relate to their gender identity, in the context of the influence exerted by social norms and the dynamics of socialization. Starting from the theoretical construction of gender as a social product (West and Zimmerman, 1987; Butler, 1990), we aimed to understand how this construct is internalized and how it manifests itself in relation to the expectations coming from society, but also from close groups – family, friends, professional environment.

From the perspective of the explanatory paradigms approached, the multiple and complex character of gender was noted: it is not just a fixed or biological trait, but a fluid reality, constantly negotiated between the individual and the social environment. The contributions of feminism, social constructivism and identity theories have provided the necessary framework to understand this permanent negotiation. The applied questionnaire was built around this idea, exploring both the personal and collective dimensions of gender identity, and the results partly reflected this complexity.

Although some of the hypotheses, such as the relationship between the influence of the immediate social environment and behavior and identity in the context of gender, were not confirmed by significant statistical correlations, this does not invalidate the basic idea: gender is experienced and expressed differently by each individual, and social pressures do not always operate directly or quantifiably. Instead, they can act subtly, cumulatively, in forms that are difficult to isolate through quantitative methods. It is possible that some respondents have internalized expectations without perceiving them as pressures, which makes self-expression even more difficult to analyze. The impact of personal gender perception on behavior and the level of identity affirmation is also emphasized.

Another important aspect that emerges from the paper is that younger generations tend to be more open to the idea that gender is different from biological sex. This can be correlated with access to alternative discourses about identity, promoted by feminism, mass media and new forms of online socialization.

On a personal level, carrying out this research represented not only an academic endeavor, but also an opportunity to reflect on one's own identity and on the way in which the context shapes us without us always realizing it. I understood more clearly that identity is not a given, but a journey. And if there is a common point in all the answers received, it would be the fact that every person seeks, in one way or another, authenticity – even when this comes in contradiction with the norms. Therefore, this paper offers conclusions regarding the importance of gender as a social construct, a determining factor of identity and a link in social life.

**References:**

1. Bandura, A. (1977). *Social Learning Theory*. Englewood Cliffs, NJ: Prentice Hall.
2. Barry, H., Bacon, M. K., and Child, I. L. (1957) A cross-cultural survey of some sex differences in socialization. *Journal of Abnormal and Social Psychology,55,* 327-332. https://doi.org/10.1037/h0041178
3. Beauvoir, S. de. (1949). *Le Deuxième Sexe*. Paris: Gallimard
4. Bem, S. L. (1981). Gender Schema Theory: A Cognitive Account of Sex Typing. *Psychological Review, 88,* 354-364. https://doi.org/10.1037/0033-295X.88.4.354
5. Berger, P. L., and Luckmann, T. (1991). *The social construction of reality.* Penguin Books.
6. Butler, J. (1990). *Gender Trouble: Feminism and the Subversion of Identity*. New York: Routledge.
7. Connell, R. W. (2002). *Gender*. Polity Press.
8. Durkheim, E. (1996). *Regulile metodei sociologice* (trad. D. Merdan). Iaşi: Polirom.
9. Eagly, A. H., and Wood, W. (2012). Social role theory. In P. A. M. Van Lange, A. W. Kruglanski, and E. T. Higgins (Eds.), *Handbook of theories of social psychology* (Vol. 2, pp. 458–476). SAGE Publications Ltd.
10. Fine, C. (2010). *Delusions of Gender: How Our Minds, Society, and Neurosexism Create Difference*. W. W. Norton & Company.
11. Freud, S. (1905). *Three Essays on the Theory of Sexuality*. London: Hogarth Press.
12. Goffman, E. (1959). *The Presentation of Self in Everyday Life*. Anchor Books.
13. Goffman, E. (2007). *Viaţa cotidiană ca spectacol.* 2nd Ed. Bucharest: Comunicare.ro
14. Lorber, J. (1994). *Paradoxes of Gender*. Yale University Press.
15. Lorber, J. (2018). *The Social Construction of Gender*, The inequality reader. DOI:10.4324/9780429494468-36
16. Parsons, T. (1951). *The Social System*. Glencoe, IL: Free Press.
17. Parsons, T., and Bales, R. F. (1955). *Family, socialization and interaction process*. Glencoe, IL: Free Press.
18. Reilly-Cooper, Rebecca (2017). *The Politics of Gender Identity: A Feminist Critique*. Palgrave Macmillan.
19. Thalos, M. (2005). The social construction of gender types and the self-construction of gender tokens. *Hypatia*, 10–26. https://doi.org/10.1111/j.1527-2001.2005.tb00536.x
20. Van Breen, J. A., Spears, R., Kuppens, T., and de Lemus, S. (2017). A multiple identity approach to gender: Identification with women, identification with feminists, and their interaction. *Frontiers in Psychology, 8*. https://doi.org/10.3389/fpsyg.2017.01019
21. West, C., and Zimmerman, D. H. (1987). Doing gender. *Gender & Society*, 1(2), 125–151. https://doi.org/10.1177/0891243287001002002
22. West, C., and Zimmerman, D. H. (2009). Accounting for doing gender. *Gender & Society, 23*(1), 112–122. https://doi.org/10.1177/0891243208326529

# The Concept of Trust and the Crisis of Trust in the Educational Community

**Amel KEZIZ**
University Center of Illizi (Algeria)
Email: keziz.amel@cuillizi.dz

**Fadhila HAMEL**
University Center of Illizi (Algeria)
Email: hamel.fadhila@cuillizi.dz

***Abstract:*** *This conceptual study examines the crisis of trust within educational communities, with particular attention to Arab and Islamic societies. It situates trust at the intersection of the sociology of education, religious and moral education, socialization, and the network of relations linking the family, school, mosque, peer groups, media, and the wider community. Methodologically, the paper uses a qualitative and interpretive review of sociological approaches to trust and of Malik Bennabi's writings on society, religion, education, and civilization. The analysis identifies the erosion of shared norms, credibility, collective responsibility, and educational ties as central mechanisms through which distrust affects social interaction and weakens the formative role of educational institutions. It also develops the idea of a Civilizational Hope Project centered on trust, collective conscience, educational action, credibility, and resistance to purposeless imitation. The study concludes that rebuilding trust requires coordinated moral and educational action across social institutions and renewed commitment to shared religious, cultural, and civic values.*

***Keywords:*** *trust; crisis of trust; educational community; sociology of education; religion*

## 1. Introduction

One of the most important areas of interaction for both individuals and groups is society, which is defined by a set of norms that establish the framework for the development of social relations. These norms reflect the individual's culture, upbringing, and life experiences and are established by the educational community. This community calls for the individual to be granted an educational status as an investment in human capital by preparing and developing his skills, ideas, and inclinations. This can only be accomplished by considering socialization's cultural and value data as well as how well it works to determine the educational action's directions in the realms of human connection (family, school, local community, peer group, mosque).

Education constitutes a key variable in the development of any society, as it contributes directly to the formation of human capital, the transmission of values, and the strengthening of social cohesion (Otovescu and Otovescu, 2022). By developing individuals' knowledge, skills, and capacity for participation, education supports economic progress, institutional stability, and the ability of communities to adapt to social and cultural change.

In order to accomplish this, the educational community must be produced as a field that enjoys a cultural status at the level of the network of social relations. This is because the educational community is not merely a transient field with a circumstantial meaning; rather, it must constitute a permanent symbol; otherwise, it withdraws to a disease at the level of human thought, which prevents the realization of the dynamism of the educational act.

The term "society," which includes the local community, frequently refers to the field that provides the social criteria required to attain effectiveness—not to accomplish personal objectives, but to represent the necessity of socializing the individual to become effective in his life, society, and environment.

Therefore, the institutions of society, regardless of their different nature, status and role, are involved in framing the educational process through the production of meaningful social values, as an attempt to overcome the inevitability of social changes, as we pointed out earlier that they created a kind of normative imbalance at the level of the network of social relations forming the interactive field.

Accordingly, the absence of those meanings that constitute the act of education and the emergence of educational issues is one of the factors that form social crises; expressing a misfortune of confidence at the level of interactions between members of society. This crisis is not in the unified sociological concept as much as it reflects anomia at the level of stability of the social structure and the interactive field, and thus the researcher finds himself in the framework of research on social and educational issues, resulting from the crisis of confidence. Hence, confronting this crisis must involve serious attempts to search for the truth of the educational issue; that is, we must try to form an educational civilizational society, which Malik Ben Nabi called the "civilizational project."

## 2. Study Concepts

### 2.1. A Sociological Reading of the Concept of Trust

Among scientists and thinkers, the concept of trust was a broad concept that was not defined by specific fields of knowledge, often reflecting the nature of social interactions according to the culture of each society, and from here, we have identified the most prominent ideas about the concept of trust.

> "Trust is an emotional and logical action that is emotionally and socially organized, which is the area in which you reveal your weaknesses to people, but believe that they will not benefit from your openness logically, and it is by evaluating the possibilities of profit and loss and calculating the expected benefit based on consistent performance data, and conclude that the person concerned will behave in a predictable manner."
>
> (Zainab, 2014: 3)

The significance of trust is widely acknowledged by academics and professionals, and in the 1990s, trust became a key strategic asset for organizations as a crucial component of productive working relationships. With a recent book on partnerships, a businessperson was cited as saying: "There are a lot of issues in partnership, but trust is really the key." (Harrison, 1996: 3) This illustrates how practitioners understand the value of trust just as much as scholars do. Partnership cannot exist without trust, which is the ultimate result of stability.

In English, trust means: Reliability, reliance on integrity; a confident expectation of obligation or responsibilities imposed on someone/thing in which trust, authority, or a fiduciary relationship is placed, such as a trusteeship; reliance on social and relational contexts rather than fear of consequences; indicators of trust include companionship, friendship, love, and agreement, i.e. some of the emotions associated with trust. (Zainab, 2014: 3)

> "Trust exists and is one of the conditions for the emergence of democracy and crucial to its functioning, although some deny that trust is an element of the explanation of politics. Trust thus seems to be an essential factor for modern societies, which some believe has become a necessary need, in a society where there are a number of formal modes of organizing social transactions (laws, codes, regulations, protocols, standards, classifications, etc.)."
>
> (Bernadette, 2016: 186)

All theorists approach trust in terms of its function in society as part of social structures that aim to understand the operationalization of trust as a prerequisite. While we recognize that trust as a concept is difficult to generalize, and it is important to know what trust is/is not to investigate how it exists in general, it must be distinguished from other concepts.

This is why we find that the trust literature has focused on the difference between trust and dependence, acknowledging the existence of dependence in relationships but not providing a semantic distinction between trust and dependence, hence sociology has focused on the meaning of the distinction between trust and dependence that may help in finding a common denominator for defining and operationalizing trust in social research (Samantha Meyer, 2014: 2)

The concept of trust cannot be contained in a single concept because it has multiple meanings and uses in life, as it is an expression of a set of meanings translated in the form of concrete actions or abstract meanings for the individual, contributing to the construction of representations based on the realization of goals with becoming and effectiveness in the field of interaction between individuals, but in the field of sociology this concept has not received an in-depth sociological understanding.

We have conceptualized the concept of trust in sociology, and the definition is as follows:

It can be said that people trust others because they have experienced their credibility, which is a belief in human nature, which shows hope on the one hand and weaknesses and risks on the other, i.e., a comprehensive evaluation process.

It can be said: Trust makes cooperative endeavors stand out. It is the key to positive interpersonal relationships in different settings because it is fundamental to how we interact with others. Trust becomes even more central and critical during periods of uncertainty due to organizational crisis in society, i.e., the "restructuring" crisis

Trust is derived from the nature of socialization, educational experiences, and the nature of the prevailing culture, as an expression of a meaning or symbol that may be transformed into an action based on the stability of networks of relationships in society.

### 2.2. Crisis of Trust

No matter how good the promises are, they lack confidence in their execution, and occasionally the limit reaches the maximum degree of crisis in the suspicion of other people. It is the state of not having the minimum level of assurance for the behavior and actions of others, but on the contrary, the maximum degree of lack of it is available. (Ehab, 2017: 89). The crisis of trust indicates the loss of the social bond that governs individuals to those social, cultural and religious values that reflect the intensity of interaction and interdependence between members of the group, so that it

constitutes an imbalance at the level of interactions and actions that reflect negatively on the stability of the social relations of the community, and leads to the occurrence of social issues that would not have occurred if the determinants of interaction and the culture of the community were understood. It shows that children are natural—and unique—cooperators. It identifies the psychological processes that allowed the earliest forms of human cooperation, even our unique forms of cultural organization, to evolve from tolerance and trust to the creation of collective structures (norms and institutions). (Bernadette, 2016: 186)

**Figure 1. The Educational Community between Trust and a Crisis of Trust**

*Source: Prepared by the authors.*

### 2.3. The Educational Community

Sociology is primarily concerned with social relations, as they reflect the social network in society that shapes the nature of culture and education. Society is the fundamental pillar of scientific and research fields, despite the existence of other aspects of social sciences that focus on other areas of knowledge. The latter focuses primarily on human social relations and uses scientific methods to study them, as it is a science concerned with the accumulation of knowledge on a broad scale. Insofar as this field relates to the education of the individual, it focuses on the impact of life, social relations, and identity development. Therefore, educational studies require the sociology of education, a scientific field that focuses on understanding the social connections between society and the educational field, concentrating on educational and social factors and organizations, the extent of cultural educational change in them, such as the family and school, and determining the social status of each.

Education is a matter of utmost importance, as it is an educational space that contributes to building educational practices that reflect the culture of society and social upbringing in its actual form. We cannot overlook the importance of closely related educational goals that are taken from the immediate nature of real things and numbers and from the actual practice in the social sphere of the individual. (Dewey, 1978: 73). The perspective of studying the educational community is directed towards understanding the educational process, as it integrates specialized knowledge and methodology, i.e., placing the educational phenomenon in its organized scientific context. Therefore, before defining the concept of the educational community, it is necessary to identify some of the main overlapping concepts that contribute to clarifying the meaning of the concept. Among the most important of these concepts are: society, group, local community, and community education.

After introducing these concepts, we can say that if society is the social sphere that encompasses human groups, then it is a collection of individuals bound together

by ties governed by a shared culture, norms, and values, which help society achieve its goal of perpetuating this structure. Community education thus becomes the sum of those interactions based on the culture of education, which affect or originate from the local community, i.e., the microcosm as a primary unit of interaction, with its own means, values, and customs that are consistent with its goals.

Hence, in the context of the concepts of society, community, social education, and local community, the educational community carries a vision of integrating all these concepts in a differentiated manner, making society an educational community that expresses the educational process in its comprehensive form. It is not limited to a specific time or place, nor to age or intellectual determinants, nor to specific educational methods. It is a general framework that contributes to the formation of meanings and values with which the individual interacts, in order to achieve a civilizational project that contributes to the requirements of development and the advancement of society.

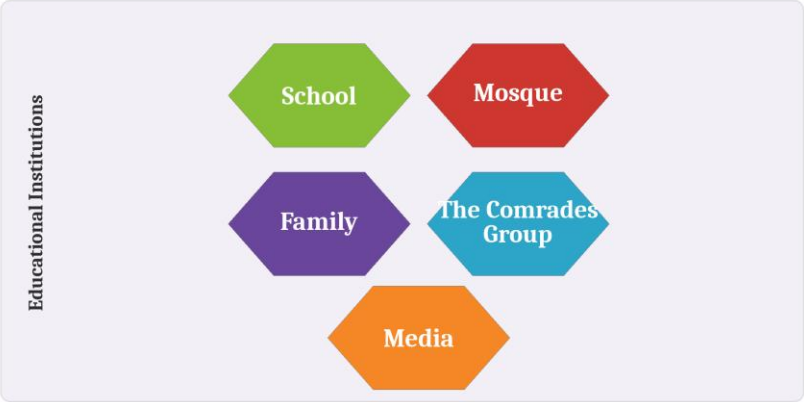
The educational community is not limited to a single socio-educational institution, nor is it concerned with a specific educational field. It is an integrated whole that helps to provide individuals, from childhood onwards, with a set of values, concepts, and social meanings that reflect the reality of the educational culture of society. Every action, meaning, or cultural given that an individual is provided with contributes to modifying and developing their actions and behaviors that fall within their social status. Thus, the educational community can be defined as:

A community that provides individuals with an educational culture based on social values and norms, through which they interact with others, making the educational process a flexible one that refines the nature of actions and interactions, based on fixed values that are neither temporary nor hypothetical. The educational community is an integrated, disciplined structure that aims to make members of the group more aware, as it focuses on the educational process of the individual from childhood and throughout their life.

Moreover, this makes it a purposeful and effective process that elevates the individual's actions to a kind of stability and social stability for the educational act, but the latter may be interspersed with an interaction at the level of society's or the individual's understanding of the educational act, making it a circumstantial society that achieves certain goals or objectives that prevent the achievement of the goal of education (the achievement of a conscious individual who preserves the culture of society).

Through its social institutions, especially the family and the school, it also aims to provide the individual with an educational knowledge base that makes society a suitable place for social life, where the individual abandons his selfishness and actions that are not in line with the nature of education, religion, and the socio-educational curriculum. The management of the educational community is based primarily on the idea that the individual is the cornerstone for building, developing, and advancing society toward a civilized society through the principle of virtue and its practice. The concept of virtue is an expression of every action or practice in life that shapes an effective social identity.

**Figure 2. Institutions of the Educational Community**




*Source: Prepared by the authors.*

### 3. Malik Ben Nabi and the Islamic Perspective on the Crisis of Trust in the Educational Community

In any case, Ben Nabi had two primary goals in mind when examining the different forms of religion (such as monotheism, polytheism, and totemism). The first was to demonstrate the enduring existence of the religious phenomenon as a characteristic of human nature; the second was to demonstrate the veracity of Muhammad's prophetic call and the revelation of the Qur'an. (Mohamed, 2006: 14)

In 1980, Malik Ben Nabi realized that the crisis in the Islamic world could not be diagnosed by superficial analysis. Thus, he appreciated the research efforts and criticized the two trends in the modern Islamic world, reformist and modernist, for not identifying the real causes of the crisis and not going beyond its symptoms. There was no systematic analysis of the crisis in a diagnostic and satisfactory study of Islamic society (Benlahcene, 2011: 58). The sense and awareness of each individual of the importance of his place in education is a social virtue in itself, which must be felt and acted upon without taking into account the actions of others who may not advocate this virtue. Therefore, society must move from social ties to the formation of educational ties, which are not united by kinship and social relations as much as they reflect the essence of achieving the educational act.

The issue of the social bond and the necessity to form an educational bond has become a social and educational necessity in fortifying society from social issues that hinder the stability of this building.

A social virtue in and of itself, each person's sense and understanding of the significance of his role in education must be felt and acted upon without considering the deeds of others who might not share this virtue. Therefore, society needs to shift from social links to the development of educational ties, which are more closely related to the educational act than they are to family and social interactions. In order to protect society from social problems that undermine the stability of this structure, the issue of the social link and the need to create an educational relationship have become social and educational necessities. Yet, since social action and contact, education, and socialization institutions, all impede the development of trust, the subject of how to rebuild trust continues to be at the center of our discussion, since it illuminates

unavoidable educational and social notions. When societies lack human, social, and religious values, they become a manifestation of various problems. As a result, we attempt to restore the lost trust between our religion, education, and culture. As a result, we may attempt to create a genuine social interaction network if we all feel responsible for our society and make our actions and behaviors meaningful.

### 4. Recognizing the Nature of Communication within the Educational Community

Educational institutions are a reflection of socialization institutions, as they are concerned with the educational process, but their objectives may differ in that socialization institutions aim to achieve an educational goal through the institution or social sphere that brings them together with the child or individual, and are often associated with child rearing in their narrow understanding of it. However, the educational community has a second goal, which is to make education a social process that is not linked to an institution as much as it is linked to the individual's life experiences.

Educational scientific discourse often focuses on the social institution as a group formed by a collection of individuals. However, social changes have disrupted this process, causing education to withdraw permanently from the social sphere to the family or school sphere. As a result, members of society have become distant from their role in the social education of children.

Not long ago, neighbors, passersby, uncles, fathers' friends, and others embraced the education of children through educational principles based on advice and supervision. Embrace the upbringing of children through educational principles based on advice and supervision, while this has begun to clearly fade away, and upbringing has become a purely family responsibility. This change is largely due to the technological revolution on the one hand, and on the other hand, the educational culture that has been integrated with new data that has changed the concept of upbringing in its broadest sense.

Each individual's sense and awareness of the importance of their place in education is a social virtue in itself, which must be felt and acted upon without regard for the actions of others who may not advocate this virtue. Therefore, society must move from social ties to the formation of educational ties, which are not based on kinship and social relations as much as they reflect the essence of educational achievement. The issue of social ties and the need to form educational ties has become a social and educational necessity in protecting society from social problems that hinder the stability of this structure.

Trust is also one of the indicators that shape a tolerant society and eliminate the crisis of trust between individuals at the level of social relations. However, the question remains as to how to restore trust as the essence of our discourse, as it highlights inevitable educational and social concepts. Social action and interaction, education and upbringing, and social institutions all overlap in shaping trust.

When societies are devoid of human, social, and religious values, they become an expression of multiple problems. This leads us to attempt to restore the trust that has been lost between us and our religion, education, and culture. Simply put, if each of us feels responsible toward our society and makes our actions and behaviors truly valuable, we may be able to build a network of genuine social interactions. One may

see some actions that we cannot tolerate, such as children throwing paper on the road in front of their father, but we cannot stop them or advise them for fear that their father will not accept our advice. Or you may yell at your neighbor's child for doing something wrong, only to be surprised when his father comes and yells at you. Yes, it is a crisis of trust that has grown between social bonds and relationships, which have become more subjective.

### 5. The Civilizational Hope Project to Reduce Socio-Intellectual Pathology

The Civilizational Hope Project—that is, "civilization"—is closely connected to the individual's life across multiple spheres of interaction. It proceeds from core interactive dimensions centered on restoring trust within networks of social and human relationships, and it is based on the following foundations:

- Trust in social interaction processes among members of the same group, extending to interactions with other human groups.
- Collective conscience, understood as awareness of the individual's positive role and a departure from selfishness.
- **Educational action:** Educational action encompasses all social inputs within the field of education that emerge from the experiences of the human community and are governed by the culture of the educational community through its active institutions. Educational action is not limited to formal schooling; rather, it extends beyond it as an expression of human life grounded in collective conscience and trust in a community culture shaped by education, social norms, and values that are effective in developing and advancing society.
- **Credibility:** In essence, credibility is a fundamental criterion for building trust in social life. It depends on the individual's intellectual orientation, which should be linked to the capacity for positive change without expectation of material reward, while being met with moral recognition.
- Avoidance of purposeless imitation, as it generates sensitivity within social relationship networks and may devolve into narcissism in social action.
- Eliminating the determinants that constitute socio-intellectual pathology, which represents an explicit threat to human life by rendering social relationships devoid of value foundations, and adopting illusory approaches that do not reflect the standards of the educational community.

In simple terms, the Hope Project calls for a reconsideration of the totality of our daily interactions and life domains that we have come to complicate despite their inherent simplicity. It entails a return to faith in a life built on trust—in ourselves and in those around us—abandoning negative assumptions about others and granting an opportunity to build an effective network of relationships, beginning with the family and extending to other spheres.

As an Islamic society, we are obliged to return to the Book of God and the Prophetic Sunnah, which translates a wealth of values capable of reviving a genuine and sincere society—one that contributes to eliminating these problems and their causes, which we have termed socio-intellectual pathology. No problem exists in isolation; rather, such problems are the outcome of imbalanced thinking that has produced conflicts at both personal and collective levels, leading to the emergence of problems, the severing of social ties, mistrust, and excessive narcissism.

As I write these words as a sociological researcher, drawing on modest experience but guided by scientific scrutiny, I have observed that human beings excel at producing problems and proposing solutions—and at expressing confidence in them and their realization. Yet, in the simplest situations, such discourse retreats into non-implementation; ideas become illusions confined to the mind—affirmed at times and denied at others—as if one were living an internal conflict whose effects manifest at the level of action.

My focus on the concept of trust and the crisis of trust is, therefore, a pathway for reflection on the dimensions of our lives, our religion, and our values—values once grounded in good faith, extending help to those in need without compensation or expectation of reciprocity. What we observe today, however, is that good deeds are often performed only when their reputation becomes widespread.

In our formulation, the Hope Project is your project as an individual: how you can change your behavior to elevate your actions. More importantly, it requires believing in yourself and in your capacity for change, and raising your children upon these values.

## 6. Results of the Study

Hence, it is necessary to understand the nature of the relationship between individuals and groups that greatly affects the spheres of society, a fact that cannot be denied in a society of social changes on many levels, whether cultural or political. If we want to preserve this pattern of interaction, we must focus on the totality of our actions and interactions that carry sincerity in the conduct of individual and group thought.

It may seem difficult, but it is not impossible if we want to improve our social life centered on the principle of trust, credibility, empathy, solidarity, and social stability.

In presenting the concepts of society, community, social education, and local community, the educational community therefore carries a vision to integrate all of these concepts into a differentiated image. Making the civic an educational community that expresses the educational process in its comprehensive form, not limited to a specific time or place, nor to age or intellectual limitations, nor to specific educational methods. In other words, a general framework helps to form meanings and values with which the individual interacts in order to achieve a civilizational project that helps to meet the needs of development, advancement, and society.

The educational community is not limited to a single socio-educational institution, nor is it concerned with a specific educational field. It is an integrated whole that helps to provide the individual from childhood with a set of social values, concepts, and meanings that reflect the reality of the educational culture of the community, and every action, meaning, or cultural knowledge provided to the individual contributes to modifying and developing their actions and behaviors that fall within the social status of the individual.

A society that provides the individual with an educational culture based on social values and norms, with which he interacts with others, makes the educational process a flexible process that refines the nature of actions and interactions, based on fixed values rather than temporary or hypothetical ones. Hence, the educational community is an integrated and controlled structure; it aims to make the members of the community more aware, as it is concerned with the educational process of the

individual from their childhood and throughout their life. This makes it a purposeful and effective process that elevates the actions of the individual to a kind of stability, and social stability of the educational act. Nevertheless, the latter may be punctuated by anomalous interaction at the level of the community or individual's understanding of the educational act, making it a circumstantial community, achieving certain goals or objectives that prevent the realization of the goal of education (achieving a conscious individual who preserves the culture of the community).

It also aims, through its social institutions, especially the family and the school, to make the individual have an educational knowledge based on making society a suitable place for social life in which the individual abandons his selfishness and his actions that are inconsistent with the nature of education, religion, and the socio-educational approach.

The management of the educational community starts with the idea that the individual is the main stone for building, developing, and developing society towards the formation of a civilized society, and this is through the principle of virtue and its implementation; virtue is the expression of every act or life practice to form an effective social identity.

## 7. Conclusion

Lastly, it could be argued that social phenomena and social issues are actually a way of expressing the current crisis in the network of social relations, which produced an interaction anomaly in the domains of the individual's life. This anomaly did not go beyond the individual's authority in thinking, but rather concentrated on all the meanings of individual ego inflation to form narcissistic individual and group interactions, which had an effect on the development of the educational community and caused a disease at the level of individual thinking, which formed the interactive crisis. In addition, the individual is the element that controls his social status, through awareness of his functions and roles, especially those related to interactive educational aspects in various social institutions. As an Islamic society, it must refer to the Book of God and His Sunnah, which translates for Muslims many values that are very capable of reviving a true and sincere society that contributes to the elimination of these issues and their causes. As there is no single issue, but it is the result of the unbalanced thinking, which produced conflicts on the personal and collective level, leading to the emergence of concerns, breaking social relations, mistrust, and excessive narcissism. The way to overcome this issue is to try to form a culture based on understanding the norms of society and understanding the nature of social relations, interactions, and ties, intending to make everyone in society aware that a corrupt act will cause an imbalance at the level of the group's shared values. Thereon, the role of education in defining the standards and values of public integrity and socializing them across society is crucial to confronting social and educational issues.

**References:**

1. Aljazzaf, Z. M., and Perry, M. (2014). Online Trust: Definition and Principles. Conference paper, October 2010. DOI: 10.1109/ICCGI.2010.17. IEEE Xplore.
2. Benlahcene, B. (2011). "Malek Bennabi's" Concept and Interdisciplinary Approach to Civilisation. Int. J. Arab Culture, Management and Sustainable Development, 2(1).
3. El-Mesawi, M. E.-T. (2014). Religion, Society and Culture in Malik Bennabi's Thought. Available at: https://www.researchgate.net/publication/228042482
4. Harrison, M. T. (1996). The Meanings of Trust. University of Minnesota, Carlson School of Management, Humphrey Center, Minneapolis.
5. Ismail, E. A. (2017). The Issue of the Concept of Trust and Sociological Contributions to Its Study. Annals of Ain Shams Literature, 45.
6. Meyer, S. (2014). Reworking the Sociology of Trust: Making a Semantic Distinction between Trust and Dependence. Available at: https://www.researchgate.net/publication/228942995
7. Otovescu, C., Otovescu, A., and Toderici, O. F. (2022). Romanian Education in an European Context: Strategic Objectives, Elite Performances and Functional Deficiecies. *Revista Universitară de Sociologie*, XVIII(3), 35–45.
8. Plumelle, B. (2016). Confiance éducation et autorité. N° 72 – septiembre.

# Professional Mobility as a Response to Perceived Organisational Injustice: The Role of Organisational Loyalty and Turnover Intention in the Romanian IT Sector

**Diana MOGA (AVIRVAREI)**
PhD Student, "Alexandru Ioan Cuza" University of Iaşi (Romania)
Email: diana.moga@student.uaic.ro

***Abstract:*** *The contemporary information-technology sector represents a privileged sociological observatory for studying the transformation of the work-organisation relationship under conditions of late capitalism. Building on the sociology of flexible work (Sennett, Bauman, Boltanski and Chiapello) and on the Romanian sociology of professional mobility (Netedu), this study examines turnover intention not as a strictly psychological reaction but as a form of social discernment through which workers re-negotiate their position within a globalised, post-Fordist labour field. The empirical investigation, conducted on a sample of 224 employees of the Romanian information-technology industry, examines the relations between job satisfaction, organisational commitment (affective and normative), perceptions of organisational injustice (distributive, procedural, interactional and informational), and turnover intention. Pearson correlations and multiple regression analyses indicate that affective commitment and job satisfaction operate as the strongest protective resources against turnover intention, while informational injustice constitutes the strongest positive predictor of intent to leave. Significant differences appear between outsourcing and product-oriented organisations, suggesting that the structural form of the firm shapes the symbolic experience of fairness and belonging. The findings are interpreted within a sociological framework that re-conceptualises loyalty as a fluid, value-driven negotiation rather than a stable contractual disposition, and turnover intention as an expression of psychosocial mobility in a labour market characterised by horizontal opportunity structures.*

***Keywords:*** *professional mobility; organisational loyalty; informational injustice; turnover intention; information-technology sector*

## 1. Introduction

The Romanian information-technology sector has become, over the past two decades, one of the most visible loci of post-socialist economic transformation. Its rapid expansion, its high integration into transnational production networks, and its capacity to absorb a young, qualified workforce make it a privileged terrain for the sociological study of contemporary work. At the same time, the sector exhibits one of the highest rates of voluntary turnover in the Romanian labour market, raising questions that exceed the explanatory range of conventional human-resources literature. The decision to leave an organisation, particularly within a field that offers high horizontal mobility, cannot be reduced to a simple cost–benefit calculation; it is, increasingly, an act of social positioning through which individuals affirm or revise their belonging to a profession, to a community of peers, and to a particular vision of working life.

Sociological reflection on the contemporary world of work has long argued that the relationship between the worker and the organisation has been progressively transformed by the diffusion of flexibility, the erosion of stable career paths, and the displacement of long-term institutional loyalties (Sennett, 1998; Bauman, 2001; Boltanski and Chiapello, 2005). Within this transformation, the figure of the mobile, self-managing worker has emerged as both a norm and a constraint, marking the

passage from a culture of organisational permanence to a culture of professional negotiation. The information-technology sector embodies this transformation in concentrated form: its workers possess highly portable skills, operate across borders, and inhabit communities of practice that frequently transcend the firm. Their loyalty, when it appears, is loyalty to a craft and to a peer group as much as to an employer.

Against this background, the present study examines turnover intention in the Romanian information-technology sector through a primarily sociological lens, retaining selected psychological constructs as analytical bridges. Turnover intention is treated here as the cognitive and affective expression of a wider sociological process of professional mobility. The study draws on a survey of 224 employees in Romanian IT organisations and tests the relations between job satisfaction, organisational commitment in its affective and normative dimensions, perceptions of organisational injustice along the four facets distinguished by Colquitt (2001), and intention to leave. Three sociological questions structure the analysis. First, what does the experience of injustice within the firm tell us about the changing nature of the contract between worker and organisation in late capitalism? Second, how does the structural form of the firm — outsourcing service provider versus product-oriented company — shape the symbolic experience of fairness and the practice of mobility? Third, in a labour market that rewards mobility, how should we understand loyalty itself, and the discernment that produces the decision to stay or to leave?

The contribution of the study is twofold. Empirically, it offers one of the first multivariate analyses of turnover intention in the Romanian information-technology sector, a field still under-represented in the national sociological literature. Theoretically, it argues that the dominant social-psychological models of turnover, while empirically robust, become more analytically powerful when re-anchored in a sociological framework that takes seriously the structural conditions of post-Fordist work and the cultural meanings of mobility.

## 2. Theoretical background: from organisational behaviour to a sociology of professional mobility

### 2.1. The sociological turn in the study of work and mobility

The sociological literature on work in late capitalism has insisted that the dissolution of long-term occupational attachments is not a peripheral phenomenon but the structural condition of contemporary employment. Sennett (1998), in his analysis of the corrosion of character under flexible capitalism, argued that the new economy systematically dismantles the narrative continuity through which workers used to make sense of their professional lives. Bauman (2001) extended this diagnosis to the broader category of social bonds, describing late-modern existence as a form of liquid sociability in which commitments are entered into provisionally and exited with relative ease. Boltanski and Chiapello (2005), tracing the rise of what they called the new spirit of capitalism, showed how the language of projects, networks and adaptability replaced the older grammar of careers, hierarchies and stable roles, redefining the legitimate worker as the mobile, self-actualising one.

In this paradigm, the firm ceases to function as the principal frame of professional identity. The worker's allegiance is increasingly distributed among the

profession, the project team, the community of practice, and the personal trajectory. Standing (2011) coined the notion of the precariat to describe the strata of workers whose lives are organised around contingent, fragmented, and insecure forms of employment, while Castells (2010) showed that the network society reshapes occupational identity around informational competence and translocal connectivity rather than around enduring institutional membership. The Romanian sociological literature has engaged with these themes through specific empirical objects. Netedu and Chmilevschi (2011), examining migration and intergenerational relationships, demonstrated how mobility, both geographic and symbolic, restructures the meaning of solidarity, replacing affective ties with transactional ones and gradually rendering loyalty itself a negotiable category. Their analysis is particularly relevant for the present study because it suggests that the decision to leave an organisation, far from being an idiosyncratic individual choice, is shaped by deeper transformations in the social meaning of belonging.

Within this sociological architecture, the information-technology sector occupies a paradigmatic position. Its workers are highly skilled, internationally connected, and structurally aware of their bargaining power. Their daily experience is shaped by the logic of projects rather than positions, by horizontal collaboration rather than hierarchical control, and by the constant proximity of alternative employers. The sector therefore amplifies, rather than suspends, the broader sociological transformations described above; it offers a privileged site for studying how loyalty, fairness and mobility are reconstructed in real time.

### 2.2. Organisational justice as a sociological resource

Within this sociological frame, the multidimensional theory of organisational justice (Colquitt, 2001; Greenberg, 1990) acquires a renewed analytical interest. The four facets of fairness — distributive, procedural, interactional, and informational — should not be read merely as cognitive evaluations but as symbolic markers through which workers assess the legitimacy of the firm as an institution and, by extension, the worth of remaining within it. Distributive justice reflects the perceived fairness of outcomes; procedural justice, the perceived fairness of decision rules; interactional justice, the quality of interpersonal treatment; and informational justice, the adequacy and openness of the explanations offered by management. Each facet operates as a different communicative channel through which the firm signals to its workers whether or not it acknowledges them as full members of the organisational community.

From a sociological standpoint, informational justice is of particular interest because it depends almost entirely on the deliberate communicative practices of management. Where distributive and procedural justice are partly anchored in formal rules, and interactional justice in everyday face-to-face relations, informational justice rests on the willingness of the organisation to render its decisions intelligible. In a sector marked by hybrid working arrangements, geographically distributed teams, and project-based collaboration, the explanatory work of management becomes the principal medium through which legitimacy is performed. The thinning of face-to-face contact in IT work, in other words, raises the relative weight of informational justice as the substrate of organisational trust.

### 2.3. Job satisfaction and organisational commitment as mediating constructs

The psychological literature on turnover, which has accumulated over more than five decades, has converged on a set of robust mediating constructs (Mobley, 1977; Hom et al., 2012). Job satisfaction (Locke, 1976; Judge et al., 2001) captures the affective evaluation of one's working conditions and is consistently associated with the decision to remain. Organisational commitment, in the influential three-component model of Meyer and Allen (1991), distinguishes the affective bond of identification with the organisation, the normative bond of perceived obligation, and the continuance bond of perceived costs of leaving. Among these, affective commitment has been shown to be the most robust protective factor against turnover intention (Meyer et al., 2002).

The present study retains these constructs as analytical bridges, but reframes their meaning sociologically. Job satisfaction is read here as a measure of the perceived congruence between the working conditions offered by the firm and the cultural expectations of the contemporary IT worker. Affective commitment is read as a residual form of belonging that survives within an otherwise mobile workforce, and that signals an alignment between the worker's biographical project and the values displayed by the firm. Normative commitment, in turn, is interpreted as the symbolic remainder of an older moral economy of obligation, less dominant in the contemporary IT sector but still detectable, particularly among employees with longer organisational tenure.

### 2.4. Outsourcing versus product-oriented firms as differentiated social fields

A specifically sociological dimension of the Romanian information-technology field consists in the structural distinction between outsourcing service providers and product-oriented companies. Outsourcing organisations operate within a logic of cost discipline, standardised deliverables, and short-cycle contractual relations with foreign clients. Their workers, while technically skilled, frequently occupy executor positions in transnational value chains, with limited scope for creative authorship over the final product. Product-oriented firms, by contrast, organise the work around long-cycle development of proprietary technology, place a higher value on creative autonomy, and tend to cultivate communities of practice marked by greater identification with the artefact itself.

From a sociological standpoint, these two organisational forms constitute distinct social fields in the Bourdieusian sense (Bourdieu, 1986): they distribute different forms of capital, structure different career trajectories, and generate different symbolic experiences of justice and belonging. The hypothesis, examined empirically in what follows, is that the perception of injustice — particularly its informational and procedural facets — is more pronounced in the outsourcing field, where the firm's decisions are often relayed from a remote client and where the discretionary space of management is correspondingly narrow.

### 2.5. Hypotheses

On the basis of the conceptual framework outlined above, the study tested four hypotheses, each grounded in a specific stream of the international and Romanian literature on the work-organisation relationship. The hypotheses are formulated in conventional psychometric terms in order to render them empirically testable, but their substantive interpretation, developed in the discussion that follows the empirical analysis, returns them to the sociological framework that motivated their selection.

The first hypothesis derives from the meta-analytic evidence that job satisfaction is one of the most consistent attitudinal antecedents of voluntary withdrawal across industries and national contexts (Locke, 1976; Judge et al., 2001). Within the contemporary IT field, where the substantive content of the work is itself a major source of professional identity, job satisfaction is expected to capture not only the affective evaluation of working conditions but also the perceived congruence between the worker's biographical project and the cultural offer of the organisation.

**H1:** Job satisfaction is negatively associated with turnover intention, operating as a protective factor against the cognitive and affective representation of leaving.

The second hypothesis follows from the three-component model of organisational commitment (Meyer and Allen, 1991) and from its meta-analytic refinement (Meyer et al., 2002), which jointly establish affective commitment as the most robust commitment-based predictor of intention to remain. In the sociological reading developed in Section 2.3, affective commitment is interpreted as the residual form of belonging that survives within an otherwise mobile workforce; its predictive primacy over normative commitment is therefore expected to reflect not merely a psychometric pattern but the broader transformation in the moral economy of work.

**H2:** Affective organisational commitment is negatively associated with turnover intention, with a magnitude greater than that of normative commitment.

The third hypothesis addresses the more contested status of normative commitment in the contemporary organisational landscape. While obligation-based loyalty has been documented as a meaningful, if comparatively weaker, antecedent of retention (Meyer et al., 2002), several sociological accounts of late-modern work suggest that the symbolic resources sustaining normative commitment have been progressively eroded under conditions of flexible capitalism (Sennett, 1998; Bauman, 2001). The hypothesis therefore predicts a negative association of reduced magnitude rather than an absence of effect.

**H3:** Normative organisational commitment exerts a smaller, but still significant, negative association with turnover intention.

The fourth hypothesis articulates the central analytical claim of the study with respect to organisational justice. Although all four facets of perceived injustice (Colquitt, 2001; Greenberg, 1990) are expected to correlate positively with turnover intention, the conceptual argument developed in Section 2.2 predicts that informational injustice will exhibit the strongest association, in line with the increasing weight of communicative legitimation in distributed and project-based work (Boltanski and Chiapello, 2005).

**H4:** Perceptions of organisational injustice are positively associated with turnover intention, with informational injustice exhibiting the strongest association.

## 3. Methodology

### 3.1. Procedure and sample

Data were collected through an anonymous self-administered online questionnaire distributed via professional networks within the Romanian information-technology sector. Recruitment proceeded by combining direct invitations within sectoral communities and a snowball technique designed to broaden coverage across organisational types and seniority levels. Participation was voluntary; respondents were informed of the academic purpose of the study and of the anonymous and confidential treatment of their answers. The questionnaire required, on average, twelve minutes to complete. Eligibility criteria were current employment in a Romanian information-technology organisation and at least three months of tenure with the current employer.

The final analytical sample included 224 employees, distributed across outsourcing service providers, product-oriented companies, and hybrid organisations combining the two business logics. The sectoral concentration of the sample makes it well suited to the central analytical question of the study, which concerns the differentiated structuring of the work-organisation relationship within the information-technology field. The sample is described in greater detail in Section 4.1.

### 3.2. Measures

A central methodological commitment of the study was the use of validated psychometric instruments rather than ad-hoc items, in order to maximise comparability with the international literature on organisational behaviour. Each construct was measured with an established scale.

Job satisfaction was measured with an abbreviated version of the Job Satisfaction Survey (Spector, 1985), retaining the facets diagnostically relevant to the IT context: pay, supervision, the nature of work, recognition, and communication. Items were rated on a five-point agreement scale, with negatively keyed items reverse-coded prior to aggregation.

Organisational commitment was measured with the affective and normative subscales of the three-component model developed by Meyer and Allen (1991). The continuance subscale was not retained, as the analytical interest of the study concerned the symbolic and affective dimensions of belonging rather than the perceived costs of leaving. Each subscale comprised six items rated on a five-point agreement scale.

Organisational justice was measured with items adapted from the Organisational Justice Scale developed by Colquitt (2001), capturing the four facets of distributive, procedural, interactional, and informational justice. For analytical purposes, the scales were re-coded so that higher scores indicate higher perceptions of injustice; this re-coding was adopted in order to facilitate the interpretation of positive correlations with turnover intention. Items were rated on a five-point response scale.

Turnover intention was measured with a three-item scale derived from the classical work of Mobley (1977), capturing thoughts of leaving, intention to search for alternatives, and stated intention to leave in the near future. Items were rated on a five-point agreement scale.

Demographic and contextual covariates included age band, gender, tenure in the current organisation, hierarchical level, and the type of company (outsourcing, product-oriented, or hybrid).

### 3.3. Analytical strategy

Analyses were conducted in SPSS. Following the inspection of internal consistency and descriptive statistics, the study examined the bivariate relations between the focal variables through Pearson correlations. The hypothesised predictive structure was then tested through multiple linear regression, with turnover intention as the criterion and the four facets of injustice, job satisfaction, and the two commitment dimensions as predictors. Differences between organisational types were examined through analysis of variance, with post-hoc Bonferroni comparisons where the omnibus test reached significance. The choice of analytical methods was deliberately conservative, in order to render the empirical pattern accessible to readers from both sociological and psychological backgrounds.

## 4. Results

### 4.1. Sample description and descriptive statistics

The 224 respondents included a balanced distribution across the seniority spectrum of the IT field, with a concentration in the mid-to-senior bracket characteristic of mature professional practice. The sample combined employees of outsourcing service providers, product-oriented companies, and hybrid organisations, in proportions consistent with the structural composition of the Romanian IT field. The age distribution was concentrated in the productive 26 to 45 bracket, and the tenure distribution covered the full range from recent entrants to long-tenured employees, which permitted the analysis of differentiated patterns across career stages.

From a sociological standpoint, the composition of the sample is itself analytically meaningful and not merely a descriptive backdrop to the inferential analysis. The presence of all three organisational forms — outsourcing service providers, product-oriented firms, and hybrid arrangements — reflects the contemporary architecture of the Romanian IT sector as a heterogeneous social space in which different positions are associated with different forms of work, different career trajectories, and different relations to transnational value chains. The tenure spread captures both recent entrants, who have been socialised into the field after the post-2010 expansion of the sector, and longer-tenured employees, whose biographical experience includes the earlier, less consolidated phase of the industry. This temporal heterogeneity is consequential because the symbolic codes through which loyalty and fairness are constructed differ across professional generations, and the perceived legitimacy of the contemporary employer is filtered through these biographical reference points.

A further observation concerns the gender and educational composition of the sample, which broadly reflects the characteristics of the Romanian IT field as documented in sectoral statistics. The strong over-representation of higher-education credentials, the concentration in technical occupations, and the predominance of metropolitan locations are not idiosyncratic features of the sample but structural attributes of the field itself. They define the population whose mobility decisions the present study seeks to understand, and they place the analysis within the wider sociological discussion of the highly qualified, internationally connected segment of the contemporary workforce (Castells, 2010).

Table 1 reports the means, standard deviations, and zero-order Pearson correlations among the focal variables. Job satisfaction ($M \approx 3.6$ on the five-point scale) and affective commitment ($M \approx 3.4$) recorded moderate-to-high values, consistent with a workforce that, while professionally mobile, retains a positive orientation towards the work itself. Normative commitment recorded a substantially lower mean ($M \approx 2.7$), reflecting the relative erosion of obligation-based loyalty in the contemporary IT context. The four perceived-injustice scores varied across the spectrum, with informational injustice reaching the highest mean among the four facets, suggesting that the explanatory work of management is the dimension where Romanian IT organisations are perceived to underperform most. Turnover intention recorded a moderate mean ($M \approx 2.9$), with a wide standard deviation indicating substantial heterogeneity in the disposition to leave.

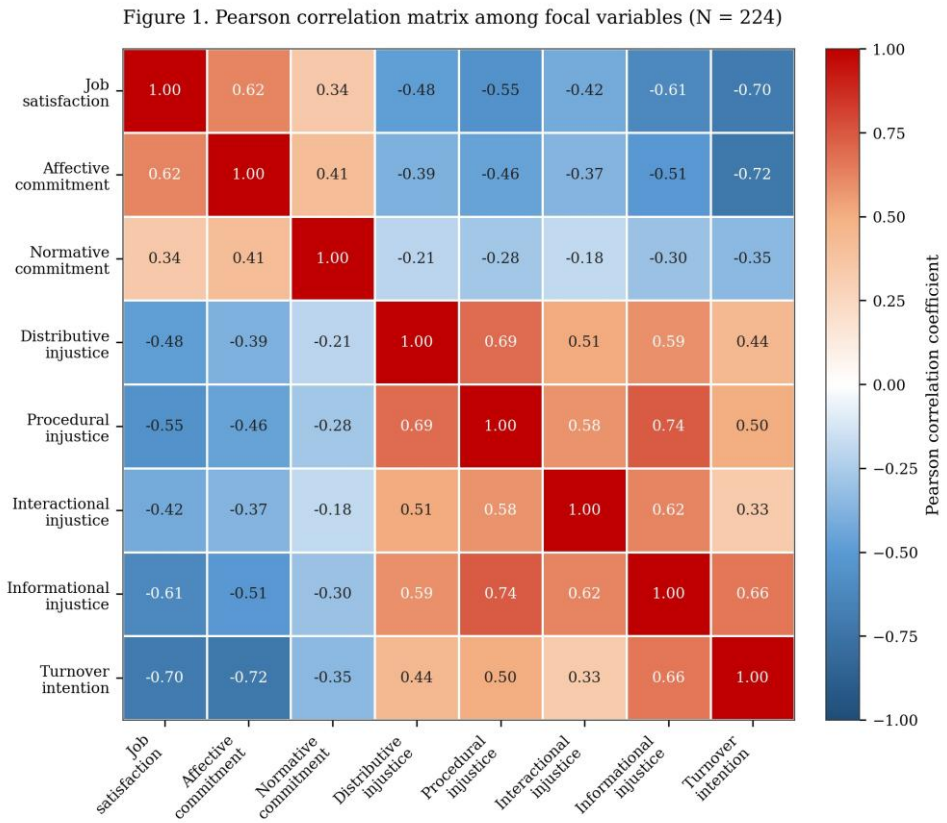
Read together, the descriptive statistics already sketch the symbolic landscape that the inferential analysis will attempt to map. The IT workforce examined here is not a disengaged or alienated population: levels of satisfaction and affective belonging remain solidly above the scale midpoint. What sets it apart from earlier conceptualisations of the industrial worker is the simultaneous presence of moderate turnover intention alongside positive affective orientations, a pattern that conventional withdrawal models would treat as inconsistent but that becomes intelligible once the field is understood as one in which mobility is normatively legitimate and structurally available. The relatively low mean for normative commitment, in conjunction with the relatively high mean for informational injustice, anticipates the central finding that the legitimacy of staying is increasingly negotiated through the communicative practices of the firm rather than through inherited moral expectations.

**Table 1.** Means, standard deviations and Pearson correlations among focal variables (N = 224)

| Variable | M | SD | 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|---|---|---|
| **1. Job satisfaction** | 3.61 | 0.74 | — | | | | | |
| **2. Affective commitment** | 3.42 | 0.81 | .62** | — | | | | |
| **3. Normative commitment** | 2.71 | 0.78 | .34** | .41** | — | | | |
| **4. Distributive injustice** | 2.69 | 0.92 | -.48** | -.39** | -.21** | — | | |
| **5. Procedural injustice** | 2.83 | 0.85 | -.55** | -.46** | -.28** | .69** | — | |
| **6. Interactional injustice** | 2.41 | 0.88 | -.42** | -.37** | -.18** | .51** | .58** | — |
| **7. Informational injustice** | 3.04 | 0.94 | -.61** | -.51** | -.30** | .59** | .74** | .62** |
| **8. Turnover intention** | 2.92 | 1.05 | -.70** | -.72** | -.35** | .44** | .50** | .33** |

*Source: own elaboration based on survey data. ** p < .01.*

***Figure 1.*** *Pearson correlation matrix among focal variables (N = 224). Blue cells indicate negative associations and red cells indicate positive associations. The heatmap visualises the protective role of job satisfaction and affective commitment (top-left blue cluster against turnover intention) and the risk role of injustice perceptions (bottom-right red cluster).*




*Source: own elaboration based on survey data.*

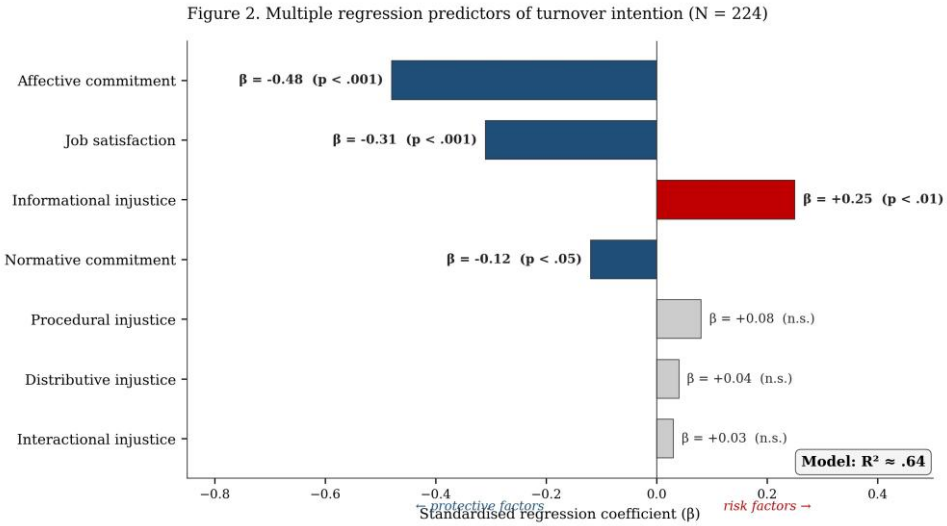
### 4.2. Bivariate relations

The pattern of zero-order correlations supported the hypothesised structure. Job satisfaction correlated negatively and strongly with turnover intention ($r = -.70$, $p < .01$), confirming H1 and aligning with the consensus established by previous meta-analytic syntheses (Judge et al., 2001). Affective commitment exhibited the strongest negative association with turnover intention among all predictors examined ($r = -.72$, $p < .01$), confirming H2 and reproducing the pattern documented by Meyer et al. (2002) in international samples. Normative commitment correlated negatively but more weakly with turnover intention ($r = -.35$, $p < .01$), consistent with the prediction in H3 that obligation-based loyalty operates with reduced intensity in the contemporary IT context. The four facets of perceived injustice all correlated positively with turnover intention, with informational injustice producing the strongest association ($r = .66$, $p < .01$), followed by procedural injustice ($r \approx .50$), distributive injustice ($r \approx .44$), and interactional injustice ($r \approx .33$), confirming H4 and the prediction that informational fairness has gained particular weight in the explanation of organisational withdrawal.

### 4.3. Multivariate analysis

A multiple linear regression was estimated with turnover intention as the criterion and the seven focal predictors entered simultaneously. The model accounted for a substantial proportion of the variance in turnover intention ($R^2 \approx .64$), indicating that the combination of psychosocial constructs captured here provides a strong explanatory grasp on the disposition to leave. Within the model, affective commitment emerged as the strongest unique predictor ($\beta \approx -.48$, $p < .001$), followed by job satisfaction ($\beta \approx -.31$, $p < .001$) and informational injustice ($\beta \approx .25$, $p < .01$). Normative commitment retained a small but statistically significant coefficient ($\beta \approx -.12$, $p < .05$), while procedural and distributive injustice fell short of conventional thresholds of significance once the other predictors were controlled, and interactional injustice was likewise not significant in the multivariate model. The substantive implication is that affective belonging and informational fairness, taken together, dominate the explanation of turnover intention in the IT field, while the other facets of fairness operate primarily through their association with the dominant predictors.

***Figure 2.*** *Standardised regression coefficients (β) for the multivariate prediction of turnover intention (N = 224). Blue bars represent statistically significant protective factors, the red bar represents the only injustice facet that retained unique predictive power once the other predictors were controlled, and grey bars represent non-significant predictors. The figure shows that affective belonging and informational fairness dominate the multivariate explanation of turnover intention.*

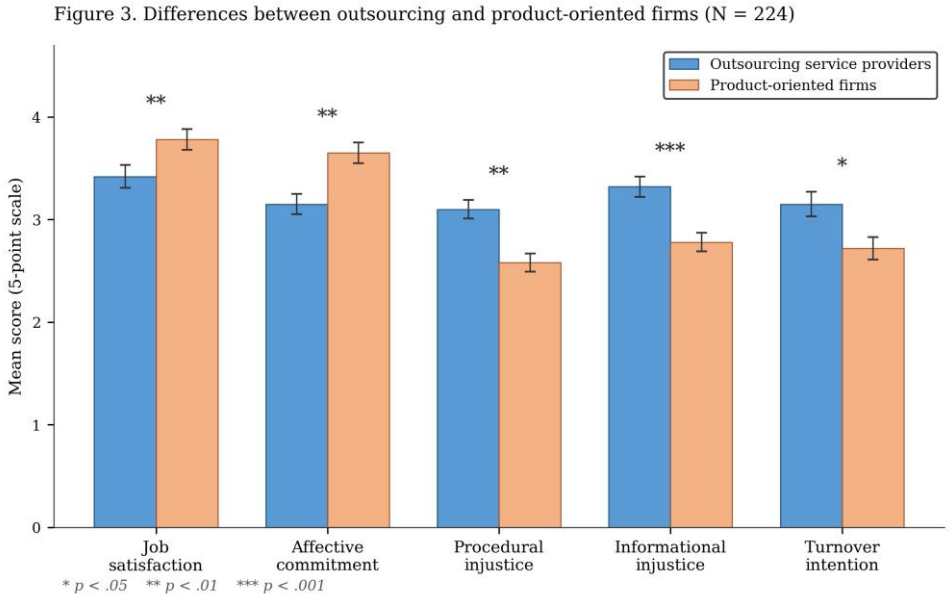



*Source: own elaboration based on survey data.*

### 4.4. Differences between outsourcing and product-oriented firms

A second analytical step examined whether the pattern just described differs across organisational types. Univariate analyses of variance indicated that employees of outsourcing service providers reported significantly higher levels of perceived informational injustice and procedural injustice than employees of product-oriented firms, while the latter reported higher levels of affective commitment and job satisfaction. Turnover intention was, on average, slightly higher among outsourcing employees, although the difference was less pronounced than the difference in the structural antecedents. The pattern is consistent with the theoretical expectation that the structural form of the firm shapes the symbolic experience of fairness: in outsourcing organisations, where decisions are often relayed from foreign clients and where the discretionary space of management is narrow, the explanatory work necessary to legitimise organisational decisions is structurally constrained, with consequences that are visible in the everyday perception of fairness.

***Figure 3.*** *Comparison of psychosocial scores between outsourcing service providers and product-oriented firms (N = 224). Mean values are reported on the original five-point scale, with error bars representing the standard error of the mean. Significance markers above each pair denote the result of independent-samples t-tests. The figure shows that the structural form of the firm differentially distributes both protective and risk factors.*




*Source: own elaboration based on survey data.*

A note of methodological caution is warranted. The relatively close correlations between procedural and informational injustice ($r \approx .74$) raise the question of whether respondents reliably distinguish between the two facets in everyday experience. It is plausible that, in a high-tempo working environment, the perception of unjust procedures and the perception of insufficient explanation merge into a single experience of opacity. Future research employing structural equation modelling could test the discriminant validity of the two constructs more rigorously.

## 5. Discussion

The results presented above are open to a layered interpretation that draws together the empirical findings, the sociological framing of the study, and the broader transformation of the work-organisation relationship in late capitalism. Three implications deserve particular attention.

First, the centrality of informational injustice in the explanation of turnover intention should be read as the empirical signature of a deeper structural transformation. In the older industrial economy, the worker's sense of fairness was anchored in the materiality of distributive outcomes and the visibility of procedural rules. In the contemporary information-technology field, by contrast, where work is partially distributed across hybrid arrangements, where the firm is often a node in a

transnational value chain, and where everyday interactions are mediated by digital channels, the principal medium through which legitimacy is performed is the explanation. The willingness of management to render decisions intelligible has therefore acquired a structural weight that older models, focused on outcomes and procedures, did not anticipate. From a sociological standpoint, this finding aligns with Boltanski and Chiapello's (2005) argument that the new spirit of capitalism legitimises itself through narratives of project, mission, and shared meaning rather than through the bureaucratic transparency of stable hierarchies. When the narrative breaks down, when the firm fails to explain itself, the symbolic basis of belonging weakens and mobility becomes the rational response.

Second, the pattern of differences between outsourcing and product-oriented firms supports the hypothesis that these are distinct social fields with different distributions of symbolic capital. In outsourcing organisations, where workers operate as executors within transnational chains of command, the experience of fairness is constrained by the structural opacity of the client–vendor relation. The decisions that matter most for the worker's career — what projects to enter, what technologies to learn, what timelines to follow — are made elsewhere and arrive already framed. In product-oriented firms, where the work concerns the long-cycle development of a proprietary artefact, workers participate more substantively in the construction of meaning and accumulate higher levels of affective commitment. The implication for the sociology of the Romanian IT field is that the well-known divide between outsourcing and product-oriented firms is not merely an economic distinction but a stratification of the symbolic resources available to workers.

Third, the relative weakness of normative commitment in the multivariate model contributes to the broader sociological diagnosis of late-modern work. The contemporary IT worker, in this sample, does not stay primarily because of an inherited sense of obligation. The affective bond, when present, derives from the substantive content of the work and from the perceived alignment between the worker and the organisation, rather than from a moral architecture of duty. This finding resonates with the Romanian sociological literature on mobility (Netedu and Chmilevschi, 2011), which has shown that the modern Romanian worker increasingly operates within a network of provisional commitments. Within the IT field, this network is intensified by the global structure of the labour market, which makes mobility cheap and visible and, in so doing, recasts loyalty as the outcome of a continuous evaluation rather than a stable disposition.

Together, these three implications suggest that turnover intention in the Romanian IT field is not best understood as a private psychological state but as a sociological phenomenon shaped by the structural and symbolic conditions of the new economy. Workers, when they consider leaving, are not simply expressing dissatisfaction; they are performing a form of social discernment through which they renegotiate their place within a labour market that rewards mobility and within an organisation that, increasingly, must earn its legitimacy through everyday communicative practice.

## 6. Limitations and directions for future research

Three limitations of the present study should be acknowledged. First, the cross-sectional design constrains causal inference. While the theoretical argument places injustice perceptions, satisfaction, and commitment as antecedents of turnover intention, the data cannot rule out reciprocal influences and bidirectional dynamics, particularly between commitment and satisfaction. A longitudinal multi-wave design would offer a stronger test of the temporal ordering implied by the model. Second, the reliance on self-report measures introduces the possibility of common-method bias, although the use of psychometrically distinct scales and the partial mediation pattern of the multivariate results mitigate this concern. Third, the sample, while substantial, is non-probabilistic and concentrated in the Romanian IT field; generalisation to other sectors or to other Central and Eastern European labour markets requires replication.

Three directions for future research follow naturally. The first concerns the deeper sociological characterisation of the outsourcing field as a stratified social space, possibly through qualitative ethnographic work that complements the quantitative pattern documented here. The second concerns the integration, into the model, of the broader life-course dynamics that shape the meaning of mobility, including family formation, intergenerational support relations, and the geographic distribution of professional networks, in a manner consistent with the Romanian sociological tradition (Netedu and Chmilevschi, 2011). The third concerns the development of structural-equation models capable of testing the discriminant validity of the four facets of fairness in the specific context of distributed and hybrid work, where the experience of procedure and the experience of explanation may have effectively merged into a single perceptual dimension.

## 7. Conclusions

The study examined turnover intention in the Romanian information-technology sector through a primarily sociological lens that retained selected psychological constructs as analytical bridges. Drawing on a survey of 224 employees and on multiple regression analyses, the study showed that affective commitment and job satisfaction operate as the strongest protective resources against the disposition to leave, while informational injustice constitutes the strongest positive predictor in the bivariate analysis and a robust unique predictor in the multivariate model. The pattern of differences between outsourcing service providers and product-oriented firms was interpreted as evidence that the structural form of the firm shapes the symbolic experience of fairness and the practice of mobility. These findings were re-anchored in a sociological framework that conceptualises loyalty as a fluid, value-driven negotiation rather than a stable contractual disposition, and turnover intention as an act of social discernment within a labour market that rewards mobility.

The principal contribution of the study is to argue that the dominant social-psychological models of organisational withdrawal, while empirically robust, become more analytically powerful when they are re-embedded in a sociological account of late-modern work. Within the Romanian information-technology field, the worker's decision to stay or to leave is shaped less by an inherited moral economy of obligation and more by an ongoing assessment of whether the firm continues to render itself

intelligible and to honour the implicit contract that binds the worker to the project. In an economy that has structurally devalued long-term institutional loyalties, organisations that wish to retain their workers cannot rely on commitment as a default disposition; they must earn it through the daily practice of informational fairness, the cultivation of meaningful work, and the recognition of the worker as a full member of the organisational community. Loyalty, in this account, is no longer the absence of leaving; it is the active, repeated choice to stay.

**References:**

1. Bauman, Z. (2001). *The Individualized Society*. Cambridge: Polity Press.

2. Boltanski, L., and Chiapello, E. (2005). *The New Spirit of Capitalism*. London: Verso.

3. Bourdieu, P. (1986). The forms of capital. In J. G. Richardson (ed.), *Handbook of Theory and Research for the Sociology of Education* (pp. 241–258). New York: Greenwood Press.

4. Castells, M. (2010). *The Rise of the Network Society (2nd ed.)*. Chichester: Wiley-Blackwell.

5. Colquitt, J. A. (2001). On the dimensionality of organizational justice: A construct validation of a measure. *Journal of Applied Psychology*, 86(3), 386–400.

6. Colquitt, J. A., Conlon, D. E., Wesson, M. J., Porter, C. O. L. H., and Ng, K. Y. (2001). Justice at the millennium: A meta-analytic review of 25 years of organizational justice research. *Journal of Applied Psychology*, 86(3), 425–445.

7. Greenberg, J. (1990). Organizational justice: Yesterday, today, and tomorrow. *Journal of Management*, 16(2), 399–432.

8. Hom, P. W., Mitchell, T. R., Lee, T. W., and Griffeth, R. W. (2012). Reviewing employee turnover: Focusing on proximal withdrawal states and an expanded criterion. *Psychological Bulletin*, 138(5), 831–858.

9. Judge, T. A., Thoresen, C. J., Bono, J. E., and Patton, G. K. (2001). The job satisfaction–job performance relationship: A qualitative and quantitative review. *Psychological Bulletin*, 127(3), 376–407.

10. Locke, E. A. (1976). The nature and causes of job satisfaction. In M. D. Dunnette (ed.), *Handbook of Industrial and Organizational Psychology* (pp. 1297–1349). Chicago: Rand McNally.

11. Meyer, J. P., and Allen, N. J. (1991). A three-component conceptualization of organizational commitment. *Human Resource Management Review*, 1(1), 61–89.

12. Meyer, J. P., Stanley, D. J., Herscovitch, L., and Topolnytsky, L. (2002). Affective, continuance, and normative commitment to the organization: A meta-analysis of

antecedents, correlates, and consequences. *Journal of Vocational Behavior*, 61(1), 20–52.

13. Mobley, W. H. (1977). Intermediate linkages in the relationship between job satisfaction and employee turnover. *Journal of Applied Psychology*, 62(2), 237–240.

14. Netedu, A., and Chmilevschi, A.-M. (2011). Migration and intergenerational relationships. *Scientific Annals of the "Alexandru Ioan Cuza" University of Iași, Sociology and Social Work Section*, 5(1), 208–218.

15. Sennett, R. (1998). *The Corrosion of Character: The Personal Consequences of Work in the New Capitalism*. New York: W. W. Norton.

16. Spector, P. E. (1985). Measurement of human service staff satisfaction: Development of the Job Satisfaction Survey. *American Journal of Community Psychology*, 13(6), 693–713.

17. Standing, G. (2011). *The Precariat: The New Dangerous Class*. London: Bloomsbury.

# Degree of Urbanization and Participation Rate in Education and Training in CEE Countries

**Luminita IOSIF**
Lecturer, PhD, "Dunarea de Jos" University of Galati (Romania)
Email: luminist.iosif@ugal.ro

***Abstract**: The paper examines the relationship between participation in education and training and the degree of urbanization in CEE countries. The analysis starts from the New Urban Agenda, which introduces a new framework for shaping a more sustainable and liveable urban future. For territorial analysis, the NUA proposes a methodology that harmonizes international statistical comparisons and classifies an entire national territory along an urban-rural continuum. Accordingly, the Degree of Urbanisation classification distinguishes among cities, towns and semi-dense areas, and rural areas. The study employs secondary quantitative data analysis to examine participation in education and training during the previous four weeks by age, gender, and degree of urbanization, and to assess the barriers faced by people living in cities, towns, and rural areas. Drawing on Eurostat data and focusing on urban and education policies, the paper argues that participation in education and training is influenced by the degree of urbanization and shaped by community characteristics and institutional actors, including schools, district education offices, parents, NGOs, civil society organizations, the labour market, local elected authorities, and local businesses. The findings indicate persistent urban-rural disparities and underline the need for education and training policies adapted to local territorial conditions.*

***Keywords**: urbanization; education; training; DEGURBA; lifelong learning*

## 1. Introduction

Shaping real policies for urban and rural space requires an in-depth understanding of present socioeconomic conditions, which largely depends on a solid base of knowledge among the population. In this sense, education/training (learning) represents an essential factor in socio-spatial cohesion.

In recent years, the urban population in Europe has increased, and it is projected that by 2050, 1 in 7 people globally will live in urban areas (Ritchie, Samborska and Roser, 2024). In this regard, the New Urban Agenda, adopted in 2016, introduces a new urban development model for a more sustainable future, placing cities at the center of the solutions they can provide. The New Urban Agenda also promotes standards and principles related to planning, construction, development (including education), management, and the improvement of urban spaces, based on five main pillars: national urban policies, urban legislation and regulations, urban planning and design, local economy and municipal finance, and local implementation.

Until the United Nations resolution adopted in 2015, Transforming our World: the 2030 Agenda for Sustainable Development (UN, 2015), there was no global methodology or international standard for distinguishing urban from rural space. In this context, a general approach was introduced for the first time that could also be used in international comparative research. This led to the creation of the Degree of Urbanisation (DEGURBA) indicator, which divides geographic space into three main categories: cities, towns and semi-dense areas, and rural areas.

Analyzing the objectives of the New Urban Agenda 2030, we see that one of its major goals is to support positive economic, social, and environmental links between urban, peri-urban, and rural areas by strengthening national and regional development planning (UN, 2023).

Additionally, applying the degree of urbanization globally and harmonizing spatial definitions requires certain nuances. For example, the urban population share according to the Degree of Urbanisation is similar to the share based on national definitions in the Americas, Europe, and Oceania, but considerably higher in Africa and Asia (Dijkstra, Florczyk, Freire, Kemper, Melchiorri, Pesaresi and Schiavina, 2020; Van Migerode, Poorthuis and Derudder, 2024).

In this research, the term "city/cities" will refer to a local administrative unit (LAU) where at least 50% of the population lives in one or more urban centers. As defined by DEGURBA, towns and suburbs are areas where less than 50% of the population lives in rural areas and less than 50% of the population lives in urban centers. Meanwhile, a rural area is an area where more than 50% of its population lives in rural grid cells.

The 2030 Agenda for Sustainable Development, besides addressing urban space, includes 16 other objectives, with the Education 2030 Agenda becoming one of the most important. This agenda places special emphasis on substantially increasing, by 2030, the number of young people and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs, and entrepreneurship (UN, 2023).

This objective can only be achieved through equitable access to education and training in cities, towns, and rural areas.

The education system plays a crucial role in individual development and the progress of society as a whole. An educated society contributes significantly to economic growth, reduces poverty and inequality, improves health and well-being, fosters active and informed citizens, and encourages innovation and progress.

Modern societies are divided into two educational systems—urban and rural—where we observe differences in access to necessary information, options, and opportunities (Miron, 2010).

For Romania, the main differences are found in access to education, the quality of education, school infrastructure, digital skills, and cultural and social values.

This problem is further aggravated by a significant spatial disparity, with the rural population being disproportionately affected by socioeconomic conditions.

## 2. Literature Review

Urban space has been defined in multiple ways. A functionally useful definition involves the demographic, geopolitical, and social dimensions of such population settlements (Moore, Gould and Keary, 2003). Urbanization is one of the most dynamic global phenomena and is directly linked to the expansion of urban space, often driven by rural populations migrating to cities (Tan, Xu and Zhang, 2016). This is especially relevant when considering Central and Eastern Europe, which experienced forced urbanization under communist regimes.

As a result, planned cities (also called "mono-industrial cities" or "spaces of socialism") were initially established as worker settlements near industrial areas (Balockaite, 2012).

Some of the most renowned planned cities include Nowa Huta and Tychy in Poland (Runge, 2022; Oczko, 2023); Prypiat and Slavutich in Ukraine; Novoplotsk and Soligorsk in Belarus; Eisenhüttenstadt and Schwedt in Germany; Dimitrovgrad in Bulgaria (Mihaylov, 2022); Štúrovo in Slovakia (Tamáska, 2018); Sillamäe in Estonia, built after World War II (Sultson, 2020); Stucka (now Aizklaukle) in Latvia; Visaginas in Lithuania (Dabašinskienė, 2021); and Dunaújváros and Ajka in Hungary (Zechenter, 2015).

Romania has a historically complicated relationship with urban spaces and cities.

For several decades, population movement toward cities was not driven by market dynamics but rather by government decree. Between 1950 and 1960, there was strong pressure for industrialization in key regional centers such as Galaţi, Orşova, and Călăraşi, located along the Danube River (Hardi, Mladenov, Kazakov and Săgeată, 2013).

During the 1970s, the industrialization efforts shifted toward medium-sized cities, accompanied by large-scale housing construction to facilitate rural-to-urban migration. By the mid-1970s, the focus expanded to "urbanizing small towns and rural areas", with a plan to transform rural settlements into cities of approximately 25,000 inhabitants, evenly distributed across the country. Additionally, population limits were set for cities exceeding 100,000 inhabitants (Constantinescu, 2019).

Following 1989, deindustrialization, demographic changes, and uncontrolled urbanization led to diffuse and uncoordinated urban expansion, often neglecting critical public infrastructure and urban facilities (Iosif, 2013; Stănuş, Pop and Dragoman, 2021).

Over the past 25 years, Romania's transformation has been described as "a tale of two Romanias"—one dynamic and integrated with the EU, focused on urban development, and the other poor and isolated, characteristic of rural areas. Both, however, have been deeply affected by a demographic crisis, driven by low birth rates and intensified migration to Western Europe (World Bank, 2018).

A historical perspective on urban development is essential to understanding how pre-1989 events have shaped all aspects of life, including education and access to education in specific geographic areas.

The transition period of the last 30 years has been full of challenges, driven by issues inherited from communist regimes, problems specific to the transition from communism to democracy and a market economy, as well as challenges inherent to the functioning of any democracy. Among these, urban and rural development and the educational process have held a special place.

Although there are numerous studies on urban planning in CEE countries, which help us understand society, the economy, and spatial change (Dawson, 1987; Petrovici, 2006; Bajnai and Józsa, 2019), very few comparatively analyze the population's participation in education and training, considering different contexts

such as city or town size, geographic location, the responsibilities of local actors, and the outcomes of already implemented policies.

This is precisely the gap that this research intends to fill.

On the road to achieving the Education 2030 Agenda, many studies have focused on the role that cities play in educational planning and management (Miron, 2016; Warsewa, 2017; Tibussek, 2017; Heinrich and Million, 2022) to ensure universal access to quality education. In this regard, UNESCO projects and research conducted since 2020 by the UNESCO International Institute for Educational Planning (IIEP), in collaboration with the UNESCO Institute for Lifelong Learning (UIL), among member cities of the Global Network of Learning Cities (GNLC), highlighted several challenges: shortages of skilled human resources; financial and infrastructure limitations related to education; insufficient collaboration among city departments; limited engagement and participation in lifelong learning initiatives; and inadequate responses to social vulnerability, social inequality, violence, school dropout, and regional inequalities.

We thus bring into discussion the global learning city initiative, which defines a learning city as one that promotes lifelong learning for all. The UNESCO Global Network of Learning Cities (GNLC) comprises 356 cities in 79 countries. CEE countries have a considerable presence: Latvia, 2 cities; Lithuania, 1; Poland, 1; Slovakia, 2; Slovenia, 3; Hungary, 2; Romania, 3; Bulgaria, 1; and Czechia, 0 (Crimi, 2021; UNESCO-UIL, 2024).

## 3. Methods

This study examines the participation rate in education and training during the previous four weeks by age, gender, and degree of urbanization of the population in CEE countries through secondary quantitative data analysis. The analysis relies on national statistics (such as those from Romania's National Institute of Statistics), government reports, international organizations (including the European Union, the UNESCO Institute for Lifelong Learning, the International Institute for Educational Planning, and the OECD), and academic research. The primary data sources include degree-of-urbanization statistics, with a specific focus on identifying trends related to participation in education and training, age, and gender.

Descriptive statistical methods are used to analyze participation in education and training during the previous four weeks by age, gender, and degree of urbanization, as well as to assess the barriers to education and training faced by people from cities, towns, and rural areas.

While this research is based on secondary data, its findings allow us to better understand the post-socialist transformation of CEE educational policies and the need to adapt them to the living space (urban/rural).

## 4. Results

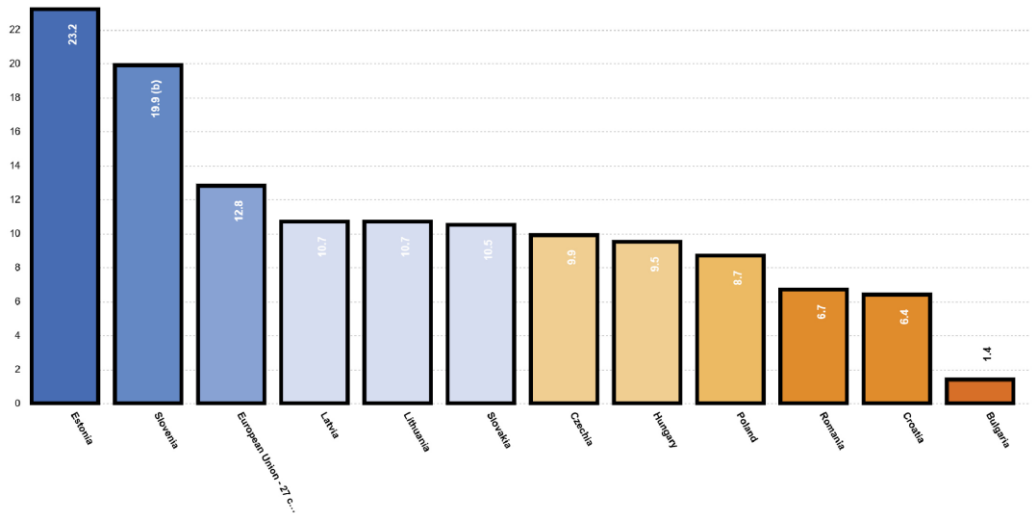
For this research on the urban space of Central and Eastern Europe, participation in education and training during the previous four weeks was analyzed by gender and age, with the age range set between 25 and 64 years.

Adult involvement in the learning process is improving, but participation rates vary significantly from one country to another.

In 2023, the distribution shows that only two countries (Estonia and Slovenia) positioned themselves above the European average (12.8%). Another six countries recorded percentages between 10.7% and 8.7%, while the last three places were occupied by Romania (6.7%), Croatia (6.4%), and Bulgaria (1.4%).

This reflects the growing disparity between Romania and the EU during the 2014–2022 period (Eurostat, 2024).

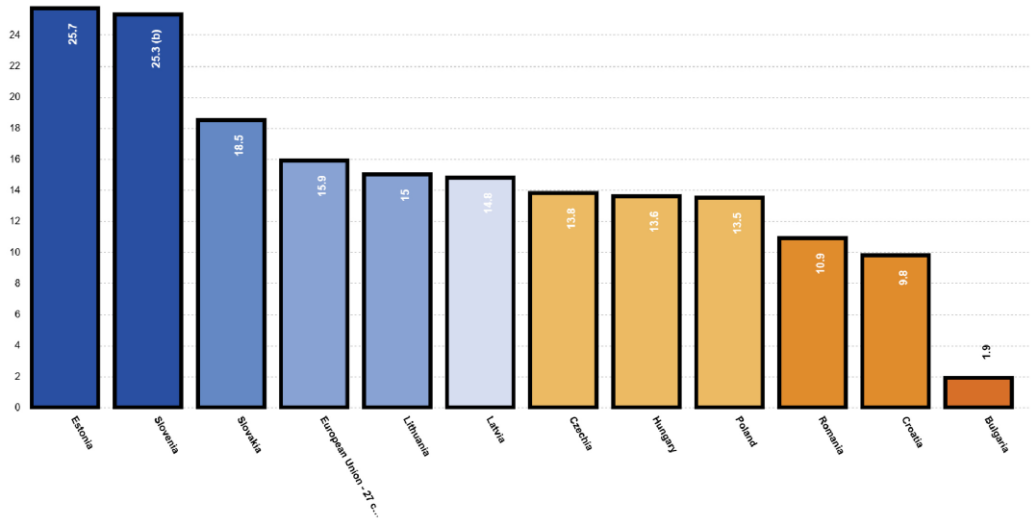
**Figure 1. Participation rate in education and training (last four weeks) in Central and Eastern European countries (CEE)**




*Source: Eurostat (2024).*

When comparing participation in education and training by DEGURBA, a significant disparity emerges, particularly between cities and rural areas. In 2023, participation in education and training at the European level stood at 15.9% in cities. The highest rates were recorded in Estonia (25.7%), Slovenia (25.3%), and Slovakia (18.5%), all three above the European average. Although this indicator has gradually increased since 2020, most CEE countries remain below the European average, with a minimum value of 1.9% in Bulgaria. We note a negative evolution for all systems analyzed during the pandemic, when education systems faced major challenges.

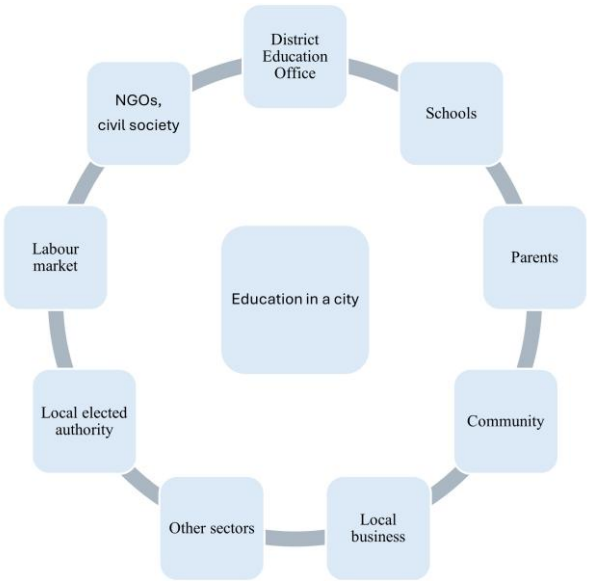
**Figure 2. Participation rate in education and training (last four weeks) by degree of urbanization: cities in CEE**




*Source: Eurostat (2024).*

Moving on to analyze the determinants underlying participation in education and training in cities, we can identify a series of actors mentioned in Figure 3.

**Figure 3. Education in a city**




*Source: Author's representation.*

Among these actors, with reference to adults aged 25 to 64, the community (including NGOs), the labour market, private companies, the central Ministry of Education—or local government, depending on the decentralization framework—are key factors influencing participation in education and training.

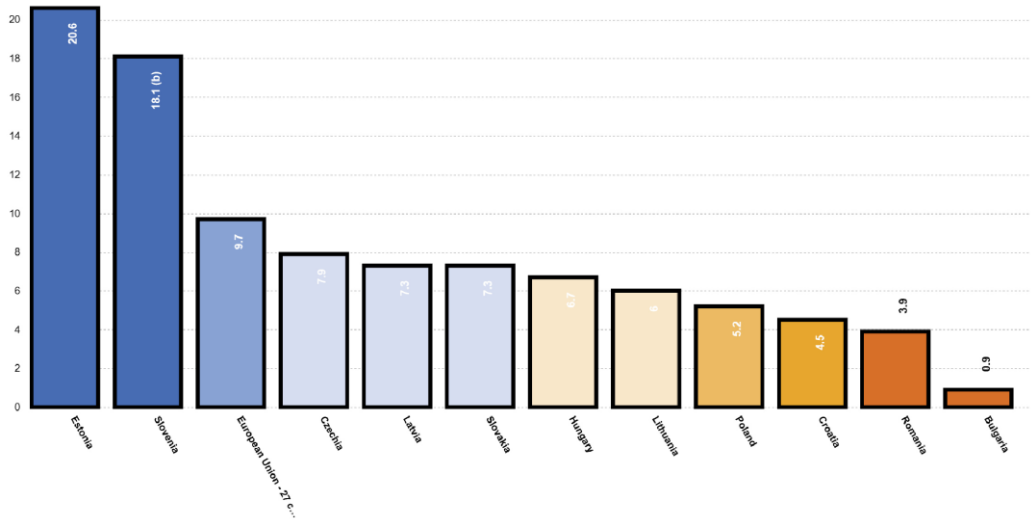
Given that the labour market is facing a multitude of challenges, the reskilling and upskilling of adults should be a priority for national, regional, and local decision-makers (OECD, 2022).

To transform challenges into opportunities and guarantee that the supply of local skills aligns with the ever-evolving demands, it is essential to establish strong adult learning systems for a more resilient and empowered community and productive economy.

There is a considerable body of literature devoted to adult education (among others, Saar, Roosalu and Roosmaa, 2022; Kalenda, 2024) and to learning cities in particular (Osborne, Kearns and Yang, 2013; Webb, Holford, Hodge, Milana and Waller, 2020; Németh, Issa, Diba and Tuckett, 2020).

According to 2023 Eurostat data, Estonia and Slovenia remain in the top two positions for rural areas, above the European average of 9.7% participation in education or training. Romania is in the penultimate position, with a rate of only 3.9%.

**Figure 4. Participation rate in education and training (last four weeks) by degree of urbanization: rural areas in CEE**




*Source: Eurostat (2024).*

A gap can be observed between urban and rural participation rates. In rural Romania, where 43% of the total population lives, this discrepancy deepens because of socioeconomic and access-related challenges, including the distances that must be covered between home and the educational institution.

In this analysis, it is also important to consider the percentage of individuals aged 18 to 24 who have left school early, which has slightly increased to 16.6%. This figure is significantly above the EU average (9.5%) and exceeds the EU target of below 9%, which Romania must achieve by 2030. The early school-leaving rate remains particularly high in rural areas (27.5%), as well as in small towns and suburbs (14.3%), compared with only 3.3% in large cities (European Commission, 2024). The low participation rate in this age group has long-term consequences for training opportunities after age 24 and for active participation in the labour market.

Participation rates are markedly higher among urban residents than among their rural counterparts. Individuals with low qualifications (ISCED 0–2) and those outside the labour market rarely engage in learning activities (3.9% and 6.4%, respectively) (European Commission, 2024). Given the increasing demand for higher-level skills in Romania's labour market (Cedefop, 2023), there is an urgent need to enhance skills-activation measures to prevent new labour shortages, particularly in digital skills. At the same time, individuals with low qualifications face growing challenges, including rising unemployment rates within this group. This highlights the need for skills policies targeting disadvantaged groups to prevent worsening inequalities (Grasu and Popovici, 2024).

Through the ESF+-funded project titled "Basic Package for Individuals Without/With Low Training Levels," launched in 2024, approximately 45,000 people are expected to benefit from personalized services that will assist them in learning the fundamentals of the Romanian language, mathematics, and digital literacy.

### 4.1. Romania's Strategic Framework for Adult Learning

Romania has developed a strategic framework outlining objectives, priorities, and measures for adult learning. The government recently adopted two national strategies for this sector: in December 2023, the National Strategy for Adult Training (2024–2027), coordinated by the Ministry of Labor and Social Solidarity; and in May 2024, the National Strategy for Continuing Adult Education (2024–2030), coordinated by the Ministry of Education. Because governance in the sector is divided, two distinct strategies were developed to allow implementation by each ministry. Complementarity was ensured by establishing common objectives and policy frameworks, such as the European Skills Agenda, and through close cooperation between ministries during the drafting process. Both strategies place strong emphasis on upskilling disadvantaged and underrepresented groups in the labour market, as well as on developing green and digital skills. However, policy responses mainly consist of EU co-financed projects (European Commission, 2024).

## 5. Conclusions

Our results demonstrate that urbanization has a profound effect on education and training.

Based on the previous analysis, participation in education and training (last 4 weeks) is influenced by the degree of urbanization, reflected in the contours of the three geographical structures (cities, towns and semi-dense areas, and rural areas).

Primarily, we refer to people who live in densely populated areas and have access to quality educational infrastructure, high educational mobility, and environments that emphasize lifelong learning. To a lesser extent, this situation is also characteristic of towns, but the truly alarming issue is found in rural areas, where early school leaving is prevalent and, in most cases, leads to labour market inactivity, further exacerbating inequalities.

Generally, we can conclude that there is a major discrepancy in participation in education and training, depending on the inhabited area, especially when considering the historical context, which has significantly influenced the development of urban and rural spaces in CEE.

The findings of our study emphasize the importance of investigating case studies to enable the development of educational policies adapted to current requirements and in line with regional development.

**References:**

1. Bajnai, L., and Józsa, A. (2019). The Necessity of Planned Urban Development. Acta Universitatis Sapientiae, European and Regional Studies, 15(1), 83–104. DOI: https://doi.org/10.2478/auseur-2019-0006.
2. Balockaite, R. (2012). Coping with the Unwanted Past in Planned Socialist Towns: Visaginas, Tychy, and Nowa Huta. SLOVO, 24(1), 41–57. Available at: https://discovery.ucl.ac.uk/id/eprint/1342776/1/Slovo_24.1_pp_41-60_Balockaite.pdf.
3. Cedefop. (2023). Cedefop Skills Forecast: Romania. Available at: https://www.cedefop.europa.eu/files/skills_forecast_2023_romania.pdf.
4. Constantinescu, I. (2019). Shrinking Cities in Romania: Research and Analysis. Berlin: DOM Publishers.
5. Crimi, H. (2021). Cities and Educational Planning and Management: IIEP and UIL Survey Analysis Report. Hamburg: UNESCO Institute for Lifelong Learning. Available at: https://unesdoc.unesco.org/ark:/48223/pf0000379537.
6. Dabašinskienė, I. (2021). Place and Language Transformations in a Post-Soviet Landscape: A Case Study of the Atomic City Visaginas. In N. Mažeikienė (ed.), Learning the Nuclear: Educational Tourism in (Post)Industrial Sites (pp. 111–134). Berlin: Peter Lang. DOI: https://doi.org/10.3726/b18090.
7. Dawson, A. H. (1987). Planning in Eastern Europe. Routledge. DOI: https://doi.org/10.4324/9781315722788.
8. Dijkstra, L., Florczyk, A. J., Freire, S., et al. (2020). Applying the Degree of Urbanisation to the Globe: A New Harmonised Definition Reveals a Different Picture of Global Urbanization. Journal of Urban Economics, 103312. DOI: https://doi.org/10.1016/j.jue.2020.103312.
9. European Commission, Directorate-General for Education, Youth, Sport and Culture. (2024). Education and Training Monitor 2024: Romania. Luxembourg: Publications Office of the European Union. DOI: https://data.europa.eu/doi/10.2766/222.
10. Eurostat. (2024). Participation Rate in Education and Training (Last 4 Weeks) by Sex, Age and Degree of Urbanization. DOI: https://doi.org/10.2908/TRNG_LFS_14.
11. Grasu, M., and Popovici, S. (2024). Special Educators als Bricoleur. Journal Plus Education, XXXVI(2), 71–79. DOI: https://doi.org/10.24250/jpe/2/2024.
12. Hardi, T., Mladenov, Ch., Kazakov, B., et al. (2013). The Change of the Urban Network along the Middle and Lower Danube during Transition. Forum Geografic, XII(2), 115–124. DOI: http://dx.doi.org/10.5775/fg.2067-4635.2013.140.d.
13. Heinrich, A. J., and Million, A. (2022). Educational Inequality and Urban Development: Education as a Field for Urban Planning, Architecture and Urban Design. In T. Freytag, D. L. Lauen and S. L. Robertson (eds.), Space, Place and

Educational Settings (pp. 33–62). Cham: Springer. DOI: https://doi.org/10.1007/978-3-030-78597-0_3.

14. Iosif, L. (2013). Education and Social Borders within Urban Outskirts. Styles of Communication, 5(1), 72–79. Available at: https://journals.univ-danubius.ro/index.php/communication/article/view/2250/2044.
15. Kalenda, J. (2024). Formation of Adult Learning Systems in Central Europe. Cham: Springer. DOI: https://doi.org/10.1007/978-3-031-59827-2.
16. Mihaylov, V. (2022). Dimitrovgrad: A Bulgarian Construction of the 20th Century. In V. Mihaylov and M. Ilchenko (eds.), Post-Utopian Spaces: Transforming and Re-Evaluating Urban Icons of Socialist Modernism. London: Routledge. DOI: https://doi.org/10.4324/9781003260769.
17. Miron, L. (2010). Dezvoltare socială în comunităţile urbane. The Annals of "Dunarea de Jos" University of Galati, Fascicle XX, Sociology, 5, 162–172. Available at: https://www.gup.ugal.ro/ugaljournals/index.php/socio/article/view/3866/3424.
18. Miron, L. (2016). Social Borders, Identity and Urban Image Construction. European Integration – Realities and Perspectives. Proceedings, 11(1), 486–491. Available at: https://proceedings.univ-danubius.ro/index.php/eirp/article/view/1769/1787.
19. Moore, M., Gould, P., and Keary, B. S. (2003). Global Urbanization and Impact on Health. International Journal of Hygiene and Environmental Health, 206(4–5), 269–278. DOI: https://doi.org/10.1078/1438-4639-00223.
20. Németh, B., Issa, O., Diba, F., et al. (2020). Learning Cities and Learning Communities: Analyzing Contextual Factors and Their Impacts on Adult and Lifelong Learning in Urban Settings. Andragogical Studies, 1, 17–52. DOI: https://doi.org/10.5937/AndStud2001017N.
21. Oczko, P. (2023). The New City of Tychy: An Early Socialist Realist Episode and Its Contestation. Architectural Histories, 11(1), 1–31. DOI: https://doi.org/10.16995/ah.8372.
22. OECD. (2022). Future-Proofing Adult Learning Systems in Cities and Regions: A Policy Manual for Local Governments. OECD Local Economic and Employment Development (LEED) Papers, 3. Paris: OECD Publishing. DOI: https://doi.org/10.1787/11fa26cc-en.
23. Osborne, M., Kearns, P., and Yang, J. (2013). Learning Cities: Developing Inclusive, Prosperous and Sustainable Urban Communities. International Review of Education, 59, 409–423. DOI: https://doi.org/10.1007/s11159-013-9384-y.
24. Petrovici, N. (2006). Socialist Urbanization in the Ceausescu Era: Power and Economic Relations in the Production of Habitational Space in Cluj. Studia Universitatis Babes-Bolyai – Sociologia, 51(1), 97–111.
25. Ritchie, H., Samborska, V., and Roser, M. (2024). Urbanization. Available at: https://ourworldindata.org/urbanization.
26. Runge, J. (2022). Tychy: From a Dormitory Town to a Large Industrial Centre. In V. Mihaylov and M. Ilchenko (eds.), Post-Utopian Spaces: Transforming and Re-

Evaluating Urban Icons of Socialist Modernism (pp. 81–99). London: Routledge. DOI: https://doi.org/10.4324/9781003260769.

27. Saar, E., Roosalu, T., and Roosmaa, E. (2022). Lifelong Learning for Economy or for Society: Policy Issues in Post-Socialist Countries in Europe. In K. Evans, W. O. Lee, J. Markowitsch and M. Zukas (eds.), Third International Handbook of Lifelong Learning (pp. 1–26). Cham: Springer. DOI: https://doi.org/10.1007/978-3-030-67930-9_28-1.
28. Stănuş, C., Pop, D., and Dragoman, D. (2021). Changing Urban System, Changing Urban Policy: Romania since 1989. In K. Zimmermann (ed.), A Modern Guide to National Urban Policies in Europe (pp. 195–215). Edward Elgar Publishing. DOI: https://doi.org/10.4337/9781839109058.00014.
29. Sultson, S. (2020). Towards Prosperous Future through Cold War Planning: Stalinist Urban Design in the Industrial Towns of Sillamäe and Kohtla-Järve, Estonia. In R. Brook, M. Dodge and J. Hogg (eds.), Cold War Cities: Politics, Culture and Atomic Urbanism, 1945–1965 (pp. 77–96). London: Routledge. DOI: https://doi.org/10.4324/9780203701478.
30. Tamáska, M. (2018). Spatial Portrait of Twin Towns on the Danube. In J. Garrard and E. Mikhailova (eds.), Twin Cities: Urban Communities, Borders and Relationships over Time (pp. 191–202). London: Routledge. DOI: https://doi.org/10.4324/9781315104638.
31. Tan, Y., Xu, H., and Zhang, X. (2016). Sustainable Urbanization in China: A Comprehensive Literature Review. Cities, 55, 82–93. DOI: https://doi.org/10.1016/j.cities.2016.04.002.
32. Tibussek, M. (2017). The Relevance of Educational Landscapes for Regional and Urban Development. In A. Million, A. J. Heinrich and T. Coelen (eds.), Education, Space and Urban Planning (pp. 289–298). Cham: Springer. DOI: https://doi.org/10.1007/978-3-319-38999-8_28.
33. UN. (2015). Transforming Our World: The 2030 Agenda for Sustainable Development. New York: United Nations. Available at: https://sdgs.un.org/2030agenda.
34. UN. (2023). The Sustainable Development Goals Report 2023: Special Edition. New York: United Nations. Available at: https://unstats.un.org/sdgs/report/2023/The-Sustainable-Development-Goals-Report-2023.pdf.
35. UNESCO-UIL. (2024). UNESCO Global Network of Learning Cities. Available at: https://www.uil.unesco.org/en/learning-cities/map?hub=38.
36. Van Migerode, C., Poorthuis, A., and Derudder, B. (2024). Flexurba: An Open-Source R Package to Flexibly Reconstruct the Degree of Urbanisation Classification. Environment and Planning B: Urban Analytics and City Science, 51(7), 1706–1714. DOI: https://doi.org/10.1177/23998083241262545.
37. Warsewa, G. (2017). Neighbourhood-Based School Strategies for Education and Integration. In A. Million, A. J. Heinrich and T. Coelen (eds.), Education, Space and Urban Planning (pp. 39–47). Cham: Springer. DOI: https://doi.org/10.1007/978-3-319-38999-8_4.

38. Webb, S., Holford, J., Hodge, S., et al. (2020). Learning Cities and Implications for Adult Education Research. International Journal of Lifelong Education, 39(5–6), 423–427. DOI: https://doi.org/10.1080/02601370.2020.1853937.

39. World Bank. (2018). From Uneven Growth to Inclusive Development: Romania's Path to Shared Prosperity. Washington, DC: World Bank. Available at: https://documents1.worldbank.org/curated/en/673121528867676119/pdf/127129-PUB-PUBLIC-pub-date-6-6-18.pdf.

40. Zechenter, K. (2015). The Repositioning of Postsocialist Narratives of Nowa Huta and Dunaújváros. Revue des Études Slaves, LXXXVI(1–2), 141–156. DOI: https://doi.org/10.4000/res.691.

# The Dynamics of Identities in Kosovo: The Emerging of Islamic Religion as an Identity Marker

**Ștefan Eugen BRUNO**
PhD Professor, National University of Science and Technology POLITEHNICA Bucharest, (Romania)
Email: bruno.stefan@upb.ro

**Camelia Cristina KOJQIQI**
PhD Student, University of Craiova, Romania
Email: cckojqiqi@hotmail.com

*"In the Balkans, religious identification became part of the national identity…"*
*Peter Black*

*"Religious harmony as it is so magnificent among Albanians it is also fragile and it needs only a bit of radicalization for the centuries-long harmony to collapse."*
*Ismail Kadare*

***Abstract***: *Western Balkans it a region distinguished by a tempestuous history, where identity markers such as religion, ethnicity and identity are steaming from the mist of the centuries and have always been present in the enmities that divided these territories. Kosovo, the newest state in Europe, ascended from the war as a secular state, however the post-conflict situation made the population more susceptible to the influence of various international networks of Islamic faith-based organizations and Islamist fundamentalists. The tutelage formed by the international powers implemented a strategy of multiethnicity in Kosovo, in order to pave the way towards independence. This can be perceived as an imposed process of de-politization of ethnicity, a process that incorporates the perils of a national identity crisis which will empower other identities markers such as religious identity to fill the void. The following paper will explore how the new Kosovar Albanian identity is being redefined by the emerging of a more fundamentalist version of the Islamic faith in Kosovo. Furthermore, it will expand on historical and social factors that shapped the actual Kosovar society. It will be illustrated that by coercing a new Kosovar identity, an identity that has been stripped from the Albanian symbols, starting with the flag, the national hymn, and the national holidays, has created an identity crisis that pushed the Kosovar Albanians to undergo a process of revitalising and heightening their Islamic beliefs.*

***Keywords***: *national identity; Islam; religious extremism; Kosovo; ethnicity*

## 1. Introduction

The fall of socialism in Europe instigated an identity crisis among Balkan societies, marking the commencement of a process of a social transformation, a process characterized by the rebirth of nationalism, revival of religion and social struggles. The shift of the societies in this phase of nationalism revitalization allowed the introduction of religion as a marker of national identity. According to Todorovic (2007), "the conviction common to all Balkan nations, that religion is deeply rooted in national identity, influenced the fact that a nation is regularly identified with religion, that is ethnical affiliation is regularly identified with confessional affiliation, and, in that

sense, religiosity renewal had the function of nations and states' legitimacy, homogenization and mobilization".

In the Balkans, the symbiosis between identity indicators such as religion, ethnicity and identity are deeply embedded in the mist of the centuries, however it preceded to a religious identity that "has been constantly present in the antagonisms that have fragmented these lands, setting neighbour against neighbour" (Black, 1999). Furthermore, the Western Balkans is a region characterised by a tumultuous past due to its position, a bridge between Europe and Asia, a place where" competing dogmas, ideologies, and spheres of influence have intersected and often collided" (Shtuni, 2016).

Kosovo, the newest state in Balkans, a place that was a colony since the 2nd century BC until recently, is still in the process of forging its identity. The Kosovar Albanians underwent a continuous process of identity eradication for centuries, encountering numerous challenges. At times Albanians used religion as a tool to fight assimilation, in order not to loose their identity. Then again, when the Western powers compelled them to embraced an unwanted identity, an identity that has been stripped from the Albanian symbols, they turned once more towards religion. Taking in consideration that the Muslim religion is predominant in Kosovo, it is understandable that Islam was the most bourgeoning religion, helped by various foreign Islamic Organizations. The rebirth of religion, as an identity pointer, in Kosovo, was caused by the interaction of a multitude of factors, some entrenched in its past, others brought on by the war and its aftermath and others by the breakdown of socialism. Scholars are divided in their views regarding the dynamics of identities in Kosovo's contemporary society, some of them worrying that Islam, as a religious identity, will supress the Kosovar Albanian identity, leading to extremism.

The term of identity is hard to be conceptualized, as it has various definitions and meanings according to the sphere of knowledge they are used, such as sociology, psychology or politique. These difficulties arise from the involvement of the ideas of culture, community and nation when trying to empirically define identity. Schlesinger (1991: 153) outlines national identity as a "specific form of collective identity" or it can be an" abstract collectivity". Furthermore, Jenkins (1996: 4) includes in the conceptualization of identity the social relationships between population, defining identity as "the ways in which individuals and collectivities are distinguished in their social relations with other individuals and collectivities". In order to comprehend the construct of identity, first the concept of nation needs to be acknowledged. According to Smith (1991: 14), a nation is "a named human population sharing an historic territory, common myths and historical memories, a mass, public culture, a common economy and common legal rights and duties for all members". Surfacing from these definitions is the idea that the collective identity is grounded in the ethnicity shared by nation's members.

The Ethnosymbolist Theory, put forward by Smith (1991: 14), highlights that ethnicity is the "named human populations with shared ancestry myths, histories and cultures, having an association with a specific territory, and a sense of solidarity". National identity is postulated to epitomize an array of cultural values that contours a national community and further assembles the individuals as adherents to the nation. This further supports the dynamic model that identities are generated from the

interplay of social relations and entails a mutual acknowledgement as emphasized by Schlesinger (1991: 154) "identity... is not to be considered a thing but rather a system of relations and representations". Thus, national identity is deeply entwined with nation, and it can be assumed that" the national identity and the nation are complex constructs of a number of ethnic, cultural, territorial, economic, legal-political components interrelated with each other" (Smith, 1991: 15).

The distinctive particularities, related to the creation of certain nations and nationalisms, can be justified by determining their ethnic and cultural foundations and the ascribed feelings. The emotional connections, related to the territory are idiosyncratic to the individuals living there and are revealed throughout the past origins of a nation. When taken in the actual societal context, the concept of national identity cannot be understood as a fixed entity, but as a fluid and flexible conception. Furthermore, Hall (1996: 6) accentuated that national identities should be perceived as a notion pieced together of interlinked structures" created through the repeated articulation of cultural differences between multiple national histories/traditions and historically specific conjunctures". The multidimensional trait of identity comprises the history, tradition, rituals, language, emotions and the culture of a nation. It is similar to an umbrella, under which the nation's members are congregated together, unified with strong bonds of solidarity in their shared traits, imparting a meaning of belonging and cohesion.

The definition given by Bloom (1990: 52) to national identity is of foremost importance for the present paper, as he suggests that "national identity describes that condition in which a mass of people have made the same identification with national symbols – have internalized the symbols of the nation...". The above statement applied to the post war situation in Kosovo when the Western forces, in their efforts to reconstruct Kosovo as a nation, removed the affinity of the citizens with the Albanian national symbols, highlights the existing threat to their national identity.

The consequences of such actions are acutely reflected in Kosovo's contemporary society and it engenders the Albanian population to question their self-identification and to search for other identity symbols. Considering the ever evolving dynamics of identities, the scope of the present paper is to underline that Kosovar Albanian identity is being redefined by the emerging of a more fundamentalist version of the Islamic faith.

## 2. Kosovo and Conversion to Islam

Kosovo, a small state located between Albania, Macedonia, Serbia and Montenegro, contains the youngest population in Europe, with 60 percent of the 1 700 000 total population being under 35 years old (Kosova Agency of Statistics, 2013). The majority of the population are ethnic Albanians (97 percent), while other ethnicities such as Serbs, Bosniaks, Turks, Ashkali, Egyptian, Roma and Gorani make up the other 3 percent of the population. Albanians, the inhabitants of Kosovo can be traced back to Illyrians, as mentioned by Greek and Roman historians (Jansen, 1999). From the 2nd century BC, Illyria became a roman colony, then after the dissolution of the Roman Empire, the Byzantine Empire took control of the region. Later, by the end of the 12th century, Serbs began raiding the Byzantine territories, settling in the region. The battle of Kosovo Polje in 1389, where the armies of Sultan Murad I triumphed over the armies

of Prince Lazar of Serbia, marks the beginning of the Ottoman domination in Serbia and Kosovo, and the Islamization of the Albanian population.

Prior to Ottoman Empire arrival and occupation, that lasted from 1389 until 1912, Albanians embraced either Catholicism or Orthodoxy. After the Ottoman conquest, in a relatively short period of time, more than 70 percent converted to Islam in order to benefit various privileges, resulting in a predominantly Muslim population, forever changing the image of Kosovo. According to Malcom (1998), "Kosovo was one of the most characteristics parts of the Ottoman Empire in Europe…Kosovo is, in many ways, Ottoman territory par excellence". During the Ottoman occupation, the conquered lands were organised in 'millets', a word that means nation. However, back then this word didn't have the same connotation as now, the 'millet' system categorised the population by their adherence to religion, regardless of their ethnicity and geographical location (Vickers, 1998). Initially, the only religions that were accepted in the 'millet' system were Christianity and Judaism, as it preceded Islam; nevertheless, later on, the system was reformulated so it could include other religions as well.

The Christian Orthodox 'millet' included the majority of the Slavic nations, with the exceptions of the Bosnian, Croats and Slovens and "attained autocephalous status for the church in their respective nations", sanctioning them to administer their own ecclesiastical activities (Payton, 2006). Church and nation in Slavic peoples' beliefs were profoundly ingrained before the Ottomans arrival due to the use of the Slavonic language in the Orthodox liturgies. All these were the major factors that stopped the Slavic population conversion to Islam during the Ottoman occupation. The 'millet' organization supplied the foundation for Serbs to create their nation state with the support of the Church, while for the Albanian nationalism was a severe obstacle because religion was considered an identity marker. According to the Ottoman Empire's Islamic political concept, religion was above all, and their world was systematised according to Muslim principles, thus Muslims were the only ones in the empire that benefited from the first-class status. Additionally, they were exempt from supplementary taxes imposed on the non-Muslims population. The major downside of the 'millet' organization resides in the impediment of a nation forming within the system, segregating the 'millets' from each other. Through these politics, the Ottoman rulers actively promoted "differentiation rather than integration…this was not a soil in which the seed of civil society could take root". Hence, the administrative structures introduced by Ottomans, across their occupied territories, had the aim to proscribe the birth of nationalism and national identity amid its lieges, whereas identification with a 'millet' for Albanians meant a stripping of ethnicity and disregard of territorial boundaries. Additionally, the Ottomans were aware that language and education were promoters of identity and nationalism, thus they constrained the use of Albanian language during their occupation.

Nevertheless, the Albanians' beliefs, were always characterised by a fluidity that enabled them to easily convert, as they previously done it by switching between Catholicism and Orthodoxy, conversion dictated by their interests at the time in order to escape the taxes imposed by the Ottoman empire, especially the so-called child tax, named 'devşirme'. Furthermore, to gain access to schooling, the right to wear arms and higher socio-economic status, Albanians embraced conversion to Sufism, a branch of the Islamic faith, known for the liberal interpretation of Islam that was "emphasizing

tolerance, love, community development, worship of God, responsibility, self-discipline and personal development" (Molaeb, 2015). This gave birth to a lot of resentful feelings among Orthodox Christians population, and in their assessment those who converted were 'Turks'. Their view bears a crucial weight, as it has been transmitted across the centuries and used incessantly by the Serbian political leaders and the Orthodox Church to justify their ideology and actions in the war against Kosovo, 'to free Kosovo from Turks'.

### 3. Religion and Identity under the Yugoslavian Occupation

As a result of the collapse of the Ottoman Empire, their occupation in Kosovo came to an end in 1912. Kosovo, previously a Christian state, emerged from the Ottoman occupation, that lasted 500 years, with the majority of its population as Muslim believers, characterised by a distinct and strong Albanian identity. The following historical period is marked by the Albanians' fight to gain autonomy, to establish an independent Albania, and to create the collective national identity of Albanians. This religious diversity was considered an impediment by the Albanian nationalists, as it could not be taken in account as a condition to establish a collective community, therefore the Albanian language was chosen as a criterion to unite a population of different religions (Hobsbawm, 1999). The Albanian national identity was sanctioned via linguistic and cultural affiliations, and by acknowledging Islam, Catholicism and Orthodoxy (Molaeb, 2015). Choosing language over religion had another inuendo, to make a clear distinction between their Albanian and Ottoman heritage, being an Albanian not a Turk, and to imply that Albanians are practicing a superficial Islam as opposed to the Turkish Muslims (Shaqiri, 2018). Pashko Vasa (1825-1892), a renown Albanian poet encouraged the Albanian people, while under Ottoman occupation, to ignore the religious barriers saying that: "Feja e shqiptarit osht shiptaria"("The faith of Albanian is Albanianism"), a quote that is still being used to promote and raise the Albanian identity above religious identity.

On November 28th, 1912, with diplomatic support from Austro-Hungary, Albania proclaimed its independence. However, the Balkan Allies, that fought against the Ottoman Empire claimed territorial parts from Albania, so the aspiration of Albanian nationalists, to unite all ethnic Albanians, could not be achieved. In 1913, at the Conference of Ambassadors in London, the Great Powers enforced Albania to give Kosovo to Serbia. Thus, Kosovo was included in the Kingdom of Serbs, Croats and Slovens, renamed Yugoslavia after World War I. This period was characterised by an intense process of colonization by Serbs, via force. Serbian politicians and historians were actively advocating for the forced expulsion of the Albanian population. One of them, Vaso Cubrilovic categorized the Albanians as 'Turks', underlining the religious rather than the ethnic background, further writing, in 1937, in his memorandum called Expulsion of the Albanians that: "The Albanians should be completely expelled from Kingdom through the use of propaganda; taking away their rights, land and jobs; and destroying their culture. If none of this worked, armed terror tactics, riots, and the burning of villages would force the rest out" (Rezun, 2001: 27). Accordingly, Serbia made arrangements with Turkey to receive and to relocate more than 500 000 Albanians from Yugoslavia, a strategy that continued until the 1960s (Malcom, 1998).

In order to sever the linguistic connections that may promote an Albanian identity and nationalism, the Serbian regime actively promoted the Islamic faith in Kosovo and closed down the Albanian schools, opened by Austro-Hungarians. Although, for Albanians, Islam had always played a tangential role in their life (Perritt, 2010). The only schools allowed by the Serbian regime were Islamic and Catholic schools (Merdjanova, 2013). Nevertheless, the Muslim clergy transformed these schools into "underground educational centres and were used as platforms to generate and spread Albanian nationalist ideas" by introducing the Albanian language in order to preserve their identity (Vokrri, 1990). As a result, the regime replaced the Albanian Islamic leaders, the Imams, as they were considered promoters of Albanian nationalism, with foreign Imams from" Sarajevo, Damascus, and Cairo… in order to educate a new generation of Kosovar Albanian subject" (Bulatović, 1988: 91 –93). This was met with powerful disagreement and rejection by the religious leaders in Kosovo, resulting in unifying their effort with Albanian nationalists to revive the education in the Albanian language through secret schools (Banac, 1984).

World War II briefly halted the Serbian occupation, as Albania and some Kosovo provinces were under Italian control, until their capitulation, when Germany took over. After World War II, Kosovo was incorporated into the Socialist Federal Republic of Yugoslavia (S.F.R.Y.), as an autonomous province, and the Albanians were acknowledged as a nationality, not as a nation (Malcom, 1988). Until the dissolution of the S.F.R.Y., the Yugoslav government's strategies towards Kosovo were to centralize and propagandize the population, in order to diminish the religious power of their imams and to force en masse migration to Turkey, policies similar to the ones used before the war. At the beginning, the schools in the Albanian language were reopened for a short period, only to be closed again by the authorities, further prohibiting the Albanians symbols and holidays (Kosovar Institute for Policy Research and Development, 2016). These discriminating actions leaded to a heighten nationalism in Kosovo, "raising awareness of an Albanian identity and promote an intra-Albanian ethnic solidarity…an identity …formed through a secular nationalist ideology base upon ethnic symbols and exclusive myths, rather than religious belonging". These same displays of nationalism are mirrored in the demonstrations that took place between 1968 and 1981, when Albanians requested the status of republic for Kosovo. The nationalist policies introduced by Slobodan Milošević and the severe retaliations of the Serbian regime threatened once again their Albanian identity, however, the raise of the Serbian nationalism was met with an even greater Albanian nationalism.

In general, the Kosovan society before 1990 was indifferent to religion and "its relation to religion was reduced to the level of nominal identification lacking any direct systematic engagement with religious rituals and practices, apart from those related to religious festivals and burial rituals" (Gola & Selaci, 2017). An introspection into Albanian history highlights that the discourse and political actions of their identity building process was free from Islamic religious orientations. Furthermore, in their fight to preserve their Albanian identity, the Albanians from Kosovo rallied around Catholic symbols, such as Mother Theresa and Scanderbeg, their national hero, celebrating Catholic holy days and ceremonies. The Serbian occupation and the struggle for liberation, that culminated in war, was a period that enabled Kosovo's Albanians to attain an unparalleled pinnacle of ethnic, religious and social homogenization. Throughout these years, religion was mainly ignored by the political

leaders and the intellectual elite, while the Muslim and the Catholic religious leaders were united in their scope to actively promote Kosovo and a pro-European and Western orientation.

## 4. The Dissolution of the Socialist Federal Republic of Yugoslavia and the War

The fall of the Berlin wall in 1989 initiated in Europe a series of movements that culminated with rendering the communism obsolete. As a result, the geo-political situation of Europe changed with new countries emerging, countries that were still struggling to find their identity and their affiliation in ethnic, cultural and political terms. The biggest shift came from the dissolution of the Federal Republic of Yugoslavia, due to the religious and historical conflicts between the ethnic population living there. It started in 1990 in Slovenia, in Croatia in 1991 and in 1992 in Bosnia and Herzegovina, followed by Kosovo in 1998. These divergences have been labelled as 'ethnic conflicts' even though the Muslims in Bosnia, together with Croatians shared the same Slavic background and language with Serbians. The only key difference that emerges is that Bosnians (Islam), Croatians (Catholicism) and Albanians (Islam, Catholicism) have a different religion and religious heritage than Serbs (Orthodoxy). Furthermore, Albanians have completely different origins (Illyrians) from Serbians and their language (Albanian) has no relation to the languages spoken in the region, hence the conflict in Kosovo had both an ethnic and religious constituent.

Rothchild and Lake (2001) remark that ethnic conflicts derive from a shared fear of future, often entrenched in the past, by unprotected collectives that are oppressed by a governing body, accurately labels the situation in Kosovo. At a national level, the conflict was encouraged mainly by Serbian politicians, nevertheless the Serbian Orthodox Church has inherent historical connections with Kosovo and also had profound relations with Milosevic's government. Malcolm (1998) pointed out the role of the Orthodox church in the conflict, that "constantly employs religious rhetoric to justify the defence of sacred Serbian interest". In the Serbian Orthodox church view, Kosovo is for the Orthodox religion a holy land, similar to what Jerusalem is to Christianity.

The war in Kosovo came to an end in spring, 1999, only after military intervention, a bombing campaign against Serbia that lasted 79 days, directed by the Northen Atlantic Treaty Organization (NATO). More than 1 million Albanians from Kosovo were displaced, 3000 Albanians were kidnaped, with more than half of them still missing, and over 13 000 fatalities were reported (79 percent were Albanians, 17 percent Serbs and 4 percent others), (Humanitarian Law Centre, 2009; International Committee of Red Cross, 2013). These losses endangered a continuous heightening of "ethnocultural cleavages, resulted in an even more polarised society" after the war (Shtuni, 2016). Additionally, as the communist ideology "lost its hegemonic power and was stigmatised…religion stood ready to fill the gap resulting from the ideological detachment with the monist past" (Gola & Selaci, 2017). The vacuum left by the socialist dogma that promoted atheism, was one of the internal factors that facilitated religious rebirth not only in Kosovo but in other post socialist countries as well. The other internal factors are strongly interlinked with each other and they have been initiated by the policies of the Western powers and their governance in Kosovo.

## 5. The Infiltration of Islam and Kosovar Identity

Following the bombing, Serbia admitted defeat and conceded the United Nations' authority as the interim government, established on 10 June, 1999 by the United Security Council, based on the UN Resolution 1244. Thus, Kosovo underwent a tutelage formed by international powers, named the United Nations Interim Administration Mission in Kosovo (Misioni i Administratës së Përkohshme të Kombeve të Bashkuar në Kosovë), known as UNMIK, in order to pave the way towards its independence. On 17th February, 2008 the Kosovo Assembly declared Kosovo independence, an independence that ceased centuries of being a 'colony', of transiting through diverse state formations, each of them with similar endings in conflict, mass killings and ethnic cleansing.

Kosovo, as an independent and sovereign state, is a dream that came true for many Kosovar Albanians, nevertheless this culminating moment had deep implications related to their national identity. For more than 8 years, UNMIK tried to model Kosovo in a modern state and "this has determined that the Western view to be reflected in the constitutional order of the state of Kosovo and its formal symbolic order", a view that ignored the history and the traditions of the region. (Shaqiri, 2018). Accordingly, the Declaration of Independence refers to the state of Kosovo as a 'multiethnic republic', while Kosovo as a 'multiethnic society' can be found in the Constitution of the Republic of Kosovo, stances that are contradicting the "informal ethno-nationalist symbolism, the narrative of which is developed by Albanian nationalism". This can be observed during celebrations such as weddings, concerts or at heroes' monuments, where only the Albanian flag, the symbol of Albanian identity is used. The strategy of 'multiethnicity' in Kosovo can be perceived as an imposed process of de-politization of ethnicity, a process that incorporates the perils of a national identity crisis that empowered the Islamic religious identity elements to fill the void. The ethnic de-politization policy has affected the flag, the national anthem titled Europe that has no text, the official holiday calendar, where the Albanian most important holidays have been renamed and their national importance have been downgraded. The national symbols exist to establish a demarcation between those that can identify themselves with the symbols and those that are not affiliated with them. The eradication of the symbols from the collective memory can be understood as an attempt to erase the identity of those who use them, a process endorsed by the Kosovar government, forced by the Western powers.

Gorani (2011) claims that the conceptualisation of national identity persuasively challenges the actions of the Western powers such as the creation of states, the mixing of different ethnicities and nationalities under "one sceptre on naturally inherited values of kinship and culture". One could ask if the decision of the international powers to establish a multiethnic state and a Kosovar identity was the right decision considering that Kosovo Albanians have a resilient Albanian identity "including all the distinctive and common hallmarks of the modern Albanian nation: history, tradition, culture, customs, territory, economy, language, mentality" (Avdyli, 2007: 169). Accordingly, Shaqiri (2018) stresses out that nationalism has always been the contemporary alternative to religion, and if it is disregarded in a society, the religion will take a central place once again.

During its mandate, UNMIK concentrated only on conflict resolution and failed to attend to local needs, leaving a void that was eagerly pervaded by Islamic organisations, that are teaching and endorsing a more fundamentalist form of Islam, the Salafi/Wahhabi form of radical Islam. Kosovo's society emerged from the war scarred from the traumatic experiences, uneducated and plunged in economic and political chaos. A society deprived of an educational system and without a functional public administration provides a fertile ground for religious ideology. Under the guise of humanitarian aid, more than 60 Islamic faiths based, relief organizations and NGO from Saudi Arabia, Turkey, Qatar, Kuwait and United Arabian Emirates appeared in Kosovo (Krasniqi, 2018). These organizations started a process of indoctrination that penetrated all levels of Kosovar society, playing a major role in changing Albanians perceptions on their identity and Islam. The Islamic organizations targeted mostly the poor, illiterate and rural areas that were appropriate for their agenda, building more than 500 mosques and making them dependent on their charity, heightening their susceptibility to their fundamentalist dogmas, ideals, and practices. Molaeb (2015: 35) argues that "radicalization finds its path to Kosovo through poverty, indoctrination through teaching, lack of development, and ignoring the people's needs".

Two NGOs, the Saudi Joint Committee for the Relief of Kosova and the Chechnya (SJCRKC) were characterised by a high activity, ensuring the daily needs of communities, such as food, clothing and housing, however SJCRKC main emphasis was education (Blumi, 2002). The Islamic Endowment Foundation (IEF), part of the SJCRKC, created more than 30 schools specialized in Koranic studies, in rural areas (Blumi 2005, p.15). Unfortunately, these agencies generated the space for recruitment of jihadist fighters by extremist organizations, while other organizations, that operated in Kosovo until 2008, cooperated with Al-Qaida, as well (Krasniqi, 2008). It has been reported that more than 314 Albanians from Kosovo went to war in Syria and Iraq and it "shows that Kosovo belongs to those countries from where the most volunteers for the jihad hail on a global scale". More than 120 'holy warriors', highly radicalised, returned to Kosovo, endangering the safety of Kosovo and Europe. Shortly after their return, they were involved in various terrorist attacks such as the poisoning of waters of Lake Badovc (2015), a failed attack; another attack was planned at a concert during Independence Day (2015), however was not successful; a cyber-attack by an Albanian Kosovar on an American base leaked the personal data and in 2016 another attack was planned during the football game between Albania and Israel, but unsuccessful again They closely collaborated with their European counterparts by trafficking explosive from Kosovo to Europe (2009), or by participating to terrorist attacks in Europe such as the attack in Sweden against the author of Mohammed caricatures (2010); a planned attack to assassinate Pope Francis (2015); the Rialto bridge in Venice was planned to be blown up; another terrorist attack in a shopping mall in Oberhaussen, Germany (2016) and another in Vienna.

The threat posed by these radicalized people is real and unpredictable, on the other hand the Kosovar government characterized by its Pro-Western attitude, declared an uncompromising engagement in combating the terrorism. The religious extremism is a serious issue that entails long term liability and coordination between government institutions and UNMIK, to be eradicated. As a result of this radicalization in Kosovo, there has been a shift between religion and identity, with some people identifying first as Muslims than as Albanians.

## 6. Conclusion

Together with the expansion of the Ottoman Empire into Balkan around 500 years ago, Islam permeated this region. The past and the political environments characteristics to these parts enacted a major role in modelling the Islamic faith in Kosovo and patterned a distinctive model with its conventional 'light Islam'. The Albanian National Identity in Kosovo endured through centuries of adversities and persecutions, and it has always been the forbidden fruit for Albanians. Nevertheless, it persevered into a strong identity.

Kosovo concludes its history as vilayet under Ottoman occupation, then as province annexed to the Kingdom of Serbia, after the Balkan Wars (1912-1913), transiting after the World War II as an independent region under the Socialist Federation of Yugoslavia, while undergoing a continuous ethnic persecution, culmination with being the 'last participant' in the 'Yugoslav wars '(1991-1999). The historical context along with Serbian repression helped endowing the rise of Albanian nationalism and the perpetuation of their identity

After the war, Kosovo, as a newly formed state, was confronted with severe challenges generated by a fundamental Islam and its doctrines brought by various Arabic and Turkish NGOs, which functioned under the disguise of humanitarian aid. The 'light Islamic' form of worshiping is being defied by the Wahhabis' Islamic principles imported from Arabic countries, channeled through monetary funding and education. This form of radical Islam initiated a process of disseminating a new Islamic identity at the cost of the Albanian Identity. Moreover, the socio-economic and political situation in Kosovo provides a fertile ground for the influence of foreign political money, overlooking the hidden agendas of the Islamic states. Establishing strict long-term policies with development and follow up plans by the governing bodies may be beneficial in suppressing radicalization and its effects on identity in Kosovo. Economic development, and membership to European Union and NATO could provide stability and security for Kosovo, in order to minimize and contain the threat of a radical Islam. A society located in Europe and inspired by radical Islam doctrines and values will always pose a danger to democracy. The answer to this contemporary situation in Kosovo is not a simple one, however the quote written by Amin Maalouf suggests that in the end all doctrines are the same and perhaps moderation is required as opposite to radicalism: "The twentieth century has taught us that no doctrine is in itself necessarily liberating; all of them can easily slide, all of them can be perverted, all of them have blooded hands, communism, liberalism, nationalism, each of the major religions and even secularity. None has exclusive right to fanaticism and no one, vice versa, has an exclusive right to humanity" (Maalouf, 2003).

A relevant comparative perspective can be established with the Romanian community in Chernivtsi. Since Romanians and the Ukrainian majority largely share the Orthodox Christian faith, religion has had a limited capacity to function as an ethnic boundary, whereas the Romanian language has represented the principal mechanism for transmitting and preserving collective identity. In Kosovo, by contrast, religious affiliation contributed more visibly to the differentiation of the predominantly Muslim Albanian population from Orthodox Serbs, although Albanian national identity remained strongly rooted in language, culture, shared ancestry, and historical memory. The comparison therefore demonstrates that identity is not preserved through a

universally dominant element, but through the cultural marker that most effectively distinguishes a community within its particular interethnic environment (Otovescu, Păsătoiu and Cioacă, 2020; Otovescu and Cioacă, 2023).

**References:**

1. Avdyli, M. (2007). Retrieved from: http://www.sakra.ch/literatur_7.htm
2. Banac, I. (1984). The National Question in Yugoslavia: Origins, History, Politics. New York: Cornell University Press
3. Black, P. (1999). Religious Identity at the Heart of Balkan War. Los Angeles Times. Retrieved from http://www.latimes.com/archive/la-xpm-1999-apr-18-mn-28714-story.html
4. Bloom, W. (1990). Personal Identity, National Identity and International Relations. New York: Cambridge University Press.
5. Blumi, I. (2002). Indoctrinating Albanians: Dynamics of Islamic Aid. ISIM Newsletter. Retrieved from https://www.academia.edu/1566829/Indoctrinating_Albanians_Dynamics_of_Islamic_Aid
6. Blumi, I. (2005). Political Islam among the Albanians: Are Taliban coming to the Balkans? Policy Research Series. Paper 2. KIPRED. Retrieved from https://www.kipred.org/repository/docs/Political_Islam_Among_the_Albanians-_Are_the_Taliban_coming_to_the_Balkans_137060.pdf
7. Bulatovic, L. (1998). Prizrenski process. Novi Sad.
8. Gola, A. and Selaci, G. (2017). Socio-Political and Religious Dynamics in Kosovo from the Post-Secularist Perspective. Croatian Political Science Review. 54(4), 85-108.
9. Gorani, D. (2011). Orientalist Ethnonationalism: From Irredentism to Independentism. Discourse Analysis of the Albanian Ethnonationalist Narrative about the National Rebirth (1870-1930) and Kosovo Independence (1980-2000). [Doctoral dissertation]. ProQuest Dissertations and Theses Global.
10. Hall, S. (1996). Introduction: Who needs identity? S. Hall & P. du Gay (eds.). Chicago: Sage Publications.
11. Hobsbawn, E. (1999). Industry and Empire: From 1780 to the present day. New York: Cambridge University Press.
12. Humanitarian Law Center. (2009). Kosovo Memory Book 1998-2000. Retrieved from http://www.kosovomemorybook.org/?page-id=28848=de
13. International Committee of the Red Cross. (2013). Kosovo: ICRC appeals for new information on missing people. Retrieved from http://icrc.org/eng/resources/document/feature/2013/04-31-kosovo-missing.htm
14. Jansen, G. R. (1999). Albanians and Serbs in Kosovo: An Abbrevieted History. Colorado: Colorado State University Press.
15. Jenkins, R. (1996). Social Identity. London: Routledge.
16. Kosovar Institute for Policy Research and Development (KIPRED). (2016). What happened to Kosovo Albanians: The Impact of Religion on the Ethnic Identity in the State Building period. Retrieved from http://www.kipred.org

17. Kosovo Agency of Statistics (2013) Kosovo Population and Housing Census 2011: Final Results. Retrieved from http://esk.rks-gov.net/rekos2011/?cid=2,40
18. Krasniqi, K. (2018). Islamist Extremism in Kosovo and the countries of the region. Perspectives of Law and Public Administration, 7(1), 60-66.
19. Lake, D. A. and Rothchild, D. (2001). The Kosovo Tragedy: The Human Right Dimensions. Ken Booth's (ed.). New York: Frank Cass Publishers.
20. Maalouf, A. (2003). In the name of Identity: Violence and the need to belong. London: Penguin Books.
21. Malcom, N. (1988). Kosovo: A short history. London: MacMillan Publishers Ltd.
22. Merdjanova, I. (2013). Rediscovering the Umma: Muslims in Balkans between Nationalism and Transnationalism. New York: Oxford University Press.
23. Molaeb, A. (2015). Kosovo's Islamic Model and its Changing Faces: The Radicalization Process that Threatens Kosovo [Master Thesis]. ProQuest Dissertations and Theses Global.
24. Otovescu, A., and Cioacă, V. O. (2023). *Comunitatea românilor din Cernăuți-Ucraina: origine etnică și discriminare politică - The Community of Romanians from Chernivtsi–Ukraine: Ethnic Origin and Political Discrimination*. 2nd revised and enlarged ed. Craiova: Sitech.
25. Otovescu, A., Cioacă, V. O., and Păsătoiu, F. (2020). The Romanian Community in Chernivtsi: Historical Landmarks and Current Issues. *Revista Universitară de Sociologie*, XVI(1), 190–201.
26. Payton, P. (2006). Ethnicity and Democratization in Europe. Abingdon: Routledge.
27. Peritt, H. (2010). The Road to Independence for Kosovo: A chronicle of the Ahtisaari Plan. New York: Cambridge University Press.
28. Rezun, M. (2001). Europe's Nightmare: The Struggle for Kosovo. Westport: Praeger.
29. Schlesinger, P. (1991). Media, State and Nation: Political Violence and Collective Identities. Chicago: Sage Publications.
30. Shaqiri, M. (2018). Albanian nationalism and the state of Kosovo. European Journal of Social Sciences. 1(3), 66-76.
31. Shtuni, A. (2016). Dynamics of radicalization and violent extremism in Kosovo. US Institute of Peace. Retrieved from http://www.jstor.com/stable/resrep12438
32. Smith, A. D. (1991). National Identity. London: Penguin Books Ltd.
33. Todorovic, D. (2007). Islam at the Balkans in the Past, Today and in the Future. Yugoslav Society to Scientific Study of Religion: YSSSR XIV Annual International Conference.
34. Vickers, M. (1998). Between Serbs and Albanians: A History of Kosovo. London: C. Hurst & Co.
35. Vokrri, A. (1999). Shkollat dhe Arsimit në Kosovë Ndërmjet dy Luftërave Botërore (1918-1941): Enti I Teksteve dhe I Mjeteve Mësimore i Ksovës. ETMM: Pristina.

# Redefining Privacy: Evolving Definitions, Emerging Interpretations and Challenged Boundaries

**Doina GAVRILOV**
PhD, National University of Political Studies and Public Administration (SNSPA), Bucharest (Romania)
Email: doina.gavrilov@yahoo.com

***Abstract*****:** *This paper starts from the challenges in technical and normative domains in defining privacy in a way that makes the concept applicable to both real -life and online contexts. Building on the existing definitions and current privacy breaches online, this study analyses the impact of social networks on the way personal space is defined by individuals and society. It concentrates on our efforts to manage and limit others' access to personal information in real life and online, and investigates the way people understand, use, and feel about social networks, as well as the tools they use for managing privacy.*

*In this light, the study proposes a natural approach to privacy, defining it as an intuitive state of being rooted in solitude and autonomy. To test this approach, we focus on the Romanian case-study and find that the main uses of social networks are to get informed, socialize, and create and maintain relationships. To enable these functions, individuals adjust their privacy limits and redefine privacy. A similar process also occurs at the social level, where privacy boundaries are lowered. As a result, individuals experience an inner conflict and struggle between the desire to have control over personal information and the need to align with new social trends, perceived as normal.*

*The paper ends with recommendations for future research regarding the potential benefits and risks of evolving social perceptions of privacy and personal space.*

***Keywords:*** *Real-life privacy; Online privacy; Autonomy; Privacy management tools; User awareness*

## 1. Introduction

The strong presence of technology in our lives changed the way we live, define privacy and its limits. Nowadays, in the name of lives transparency, the information technologies collect our private data "[a]nd sell them to individuals, government agencies and telemarketers … Our private lives are opened up to public consumption through data mining, video surveillance, facial recognition technology, and spyware" (Moore 2007, p.810).

Yet, privacy breaches are not a new phenomenon. We can trace them back to 1890's, when people needed solitude and showed desire to label it, together with privacy, as parts of the human rights necessary "to enjoy life, to be let alone, and to exercise extensive civil privileges" (Warren and Brandeis, 1890: 193). Both, solitude and privacy, are necessary for developing and exercising individual personality, where personal information is regarded as personal property and a form of possession (Warren and Brandeis, 1890).

Later, technological development raised privacy concerns regarding data accessibility and its use without consent. This new online environment, in which part of our daily activities have been transposed, gave us the liberty to access available

information easily and, in many cases, for free. This aspect raised questions about compliance with privacy boundaries online, especially regarding the way privacy is defined and understood in this new space.

The definitions of privacy we have, often refer to real-life situations. However, the absence of a definition specifically adapted to the online environment causes privacy breaches online, given the ease with which existing privacy definitions can be interpreted (Nissim and Wood, 2018).

This issue is easy to notice by overlapping the normative definitions with the technical ones. For example, from a technical perspective, privacy is seen as something akin to privacy-preserving technologies (technologies used for collecting and processing personal data, for data encryption and storage). However, this view does not help build effective technologies since the technical details are broad and leave room for interpretation.

The functionalists addressed this topic and argued that the changes in our environment and lifestyle left "our carefully calibrated privacy psychology ill-equipped to deal with twenty-first century security challenges" (Shariff, Green and Jettinghoff, 2021: 4). This is because "our reactions to privacy violations are tied not to the grave consequences of privacy erosion, but to our evolved intuitions" (Shariff, Green and Jettinghoff, 2021: 8), which did not have enough time to adapt to the continuously evolving technology that invades our lives.

Acquisti, Brandimarte and Loewenstein (2015) worked on proposing a social and behavioral perspective and showed that people face repeated privacy breaches because of the constancy of technology in our lives. The technology related challenges "have grown to the point that our natural instincts seem not nearly adequate. People are often unaware of the information they are sharing, unaware of how it can be used, and even in the rare situations when they have full knowledge of the consequences of sharing, they are uncertain about their own preferences" (Acquisti, Brandimarte and Loewenstein, 2015: 513).

Considering human feelings and privacy management routines, Geest (2018) proposed an anthropologic perspective to privacy, and found that our current privacy management challenges are similar to those in "the pre-digital *Gemeinschaft*-type community where nearly anyone was known to anyone" (Geest, 2018: 440). Yet, his approach disregards the community size, that has a huge impact on human behavior (Thomas and Fink, 1963), and the study circumstances did not incorporate online activity, that brings up a totally different level of privacy vulnerability.

In the real-life people can control better the way their information is shared and accessed across the four privacy zones (personal, intimate, semi-private and public) (Koops et al., 2017). But in online it is hard to achieve a similar level of control because user behavior is shaped by context and defined by uncertainty. Furthermore, in online most individuals are easily influenced on the type and amount of information they share, and are more vulnerable to privacy breaches. "People need assistance and even protection to aid in navigating what is otherwise a very uneven playing field" (Acquisti, Brandimarte and Loewenstein, 2015: 514).

Starting from this, we focus on addressing the following problems: 1) the interpretable normative definitions of privacy, that do not help in adjusting technologies effectively; 2) the insufficiently evolved human intuition to adapt to the

new technologies and privacy challenges; 3) the difficulty to control privacy in online as easy and intuitive as in the real-life.

To address these problems, we adopt a natural theoretical approach to privacy and focus on testing the following hypothesis: *Real-life privacy is managed primarily through intuitive, socially learned behaviors, while online privacy management relies on conscious cognitive processes and user awareness.*

## 2. Privacy – The State Of The Art

The reductionists see privacy as a human right deriving from the rights to life, liberty and property (Jarvis Thomson, 1975), and argue that there is no need for a specific branch of law for privacy because the lack of privacy highlights a breach of basic human rights.

Likewise, Davis argued that "if truly fundamental interests are accorded the protection they deserve, no need to champion a right to privacy arises. Invasion of privacy is, in reality, a complex of more fundamental wrongs" (Davis, 1959, apud Moore, 2007: 814).

Westin defined privacy as the act of "granting all private acts total immunity from surveillance" (Westin, 1966: 206). To assess the necessity of privacy breaches, he proposed the following criteria: the justified necessity of surveillance, seeking alternative solutions, the reliability of the surveillance tools, consent, and the capacity for limitation and control. Considering these criteria is important because in the name of justice and social interest, privacy is often regarded as "a passive virtue that was invoked only to place limits on assertions of freedom of speech" (Westin, 1966: 1238), while in other matters the individual faced conflict. In this context, a legal branch emerged to protect privacy from social curiosity.

The normativists argued that privacy is no different than property or life rights, but it is necessary to treat these topics separately for solving efficiently social problems touching such topics (Moore, 2012). But, this specific normative framework for privacy had to consider the technological practices alongside human rights. And in this context the technological approaches developed.

The technological approaches to privacy were considered necessary for engineering solutions that address vulnerabilities of remote access and the multi-user resource sharing computer allowing accidental or deliberate information divulgence (Ware, 1967).

Starting from this, Ware associated privacy with security and studied it in the light of "restricting information within a computer for the use of a specific group of people" and preventing the information from reaching unauthorized observation (Ware, 1967: 3-4).

Saltzer and Shroeder focused on the mechanisms of privacy protection for securing information in computer systems, and defined privacy as "the ability of an individual (or organization) to decide whether, when, and to whom personal (or organizational) information is released" (Saltzer and Shroeder, 1978: 1279). Nissenbaum (2004) called this 'contextual integrity', and mentioned that contemporary technological practices must consider specific contexts, adapt and conform to the law governing data collection and dissemination. But the law is also context dependent and indicates rightful procedures for data collection and use.

ALibeigi, Munir and Karim argued that "privacy is an individual tendency, wish and natural need to be away from others' control and surveillance" (ALibeigi, Munir and Karim, 2019: 31). Although referring to natural needs, the authors leave behind the unexplored roots and meanings of privacy from a natural and instinctive perspective.

The constant focus of literature on normative approaches and technology, created a knowledge gap regarding the natural aspects of privacy. This gap was observed by Gaebler that criticized Murphy for constantly describing privacy as a constitutional concept, and defined it as "a natural right" where "constitution is at best an act of recognition, an agreement to submit to certain rules of government, which are legitimate only because they recognize and protect our natural rights" (Gaebler, 1992: 326). Starting from this, Gaebler proposed a natural approach to privacy centered on the moral-legal bond, yet leaving the subject of evolutionary and natural human necessities unexplored.

## 3. A Theoretical Approach To Privacy Grounded In Natural Principles

Starting from the existing approaches to privacy, the Oxford English Dictionary (2025) defines it as "a state or condition of being alone, free from public attention, in which one is not observed or disturbed by other people".

The Cambridge Dictionary (2025) adopts a normative view and defines it as a "state of being alone, or the right to keep one's personal matters and relationships secret".

Although both definitions are useful in everyday life, they are not enough in addressing the practical challenges posed by the technological development. Not only this, but the definitions do not refer to the natural human needs for privacy. So, we focus further on exploring the natural needs and states of the individual and their relationship with privacy.

### 3.1 Privacy As An Intuitive State Of Being

Our greatest legacy related to a natural approach to privacy comes from Allan Westin. He saw privacy in the light of natural needs that vary from person to person, and for this reason there are no universal tools for managing them. Focused on animal studies, Westin showed the biological foundations of privacy, especially the impact of crowding on the body's natural and automatic responses.

He saw that there is "a need for temporary individual seclusion or small-unit intimacy that constitute two of the core aspects of privacy" (Westin, 1967: 27), and explained this by highlighting the functions of privacy. The first is a psychological one, and serves for emotional release. It relates to protecting individuals' "ultimate secrets" - such as fears, prayers, and hopes - that are considered highly intimate (Westin, 1967: 40).

The next one is about self-evaluation and a moral dimension expressing "the exercise of conscience by which the individual repossesses himself" (Westin, 1967: 43). This underlines the individual need for privacy to engage in internal processes like planning, reflection, and self-organization.

And the last function of privacy is about limiting and protecting communication, emerging from the individual need to protect certain conversations, share intimate information only to trusted people, and engage in open discussions free from surveillance, judgement and external observation.

Except these functions, Westin observed that there are other needs linked to security and well-being that our instincts guide us in managing the way personal information is shared; there is a strong connection between privacy and security. Yet, Westin did not continue to explore the link between privacy and the security instincts and threats, different privacy limits, etc. He looked at privacy more in terms of personal development, self-assessment, experimentation and personal autonomy (Westin, 1967, apud Margulis, 2003) than security-related aspects.

Westin (1967) showed that we need privacy for physiological, psychological, and cognitive reasons, but discussed privacy more in terms of needs than about it being a natural state of being. Starting from this, we formulate the following secondary hypothesis *(SH1): Privacy represents a natural state of the individual, inherently and intuitively exercised.* And we test it by using the *a contrario* research method.

The existing literature exploring the mechanisms of privacy management argues that privacy is both, contextually adapted (Nissenbaum, 2004) and rooted in natural human tendencies (Westin, 1967). Thus, people should be aware of the privacy limits they breach, as well as when others cross their privacy lines. But what about privacy breaches through simple observation?

Jarvis Thompson saw privacy as something akin to individuals' perception of personal space and argued for the right to be spared of other's curiosity, and trusted without constant observation (Jarvis Thomson, 1975).

But Kvande et al. (2021) showed that observing others is not only about collecting information, but also about interpreting others' actions through personal filters and judgement and projecting automated reactions. It happens that the life values we learned, shape in our mind a sense of "normality", and all incoming information is filtered and analyzed through it. As a result, we project intuitive reactions, passed through these appropriateness filters, a process called 'intuitive judgement' (Haidt et al., 1993, apud Guglielmo, 2015), that is performed in both, private and public spaces. Thus, raising the question of privacy breaches in public.

Shulman and Siprut argue that privacy breaches cannot happen in public spaces simply because in public privacy does not exist (Shulman, 1998; Siprut, 2006, apud Callo, 2011). But this does not mean that people do not expect a certain level of privacy (Callo 2011). Even more, we have a natural sense of 'it is wrong' to stare too much at others, that is part of what is called privacy intuitions. These intuitions are biological, natural instincts that evolved to selectively control the access to our physical and extended self, including territory, possessions, and intellectual property (Shariff, Green and Jettinghoff, 2021: 161).

This sense of 'wrongness' when watching others is shaped: socially, through daily life customs and the corrective reactions of those being observed; and individually, through internalized personal moral filters of right and wrong (shaped by family values and life experience). In this light, we may think that privacy is rather a cognitively-based process. Yet, most of the time, our responses are automatically projected, and rational thinking interferes only when our reactions do not bring positive feedbacks (Kahneman, 2011).

Although based initially on learning, in time, we pass all information through a trial-and-error system, and adopt automated reactions that often prove to be good and efficient. Consequently, we take most of our decisions intuitively because they require less effort, given our lazy and energy preserving nature (Kahneman, 2011: 65), and we

return to rational thinking in new environments and when the normally projected results are not satisfactory (Kahneman, 2011: 26).

### 3.1.1 Solitude – The First Source Of Privacy

Based on Westin's findings, we believe privacy has its roots in solitude - a state in which the individual can separate from the world and engage in self-care and self-actualization.

In the privacy context, we look at solitude by choice, which is a natural state of the individual, necessary to fulfill personal needs related to development and self-care (intimate actions, self-evaluation, and rest) (Stavros, 2015). This kind of solitude is natural and necessary. It enables the possibility of silence, that has a direct impact on individual's capacity to develop quietly "[and reflect upon distortions of the self and transform through greater recognition of opportunity and choice]" (Elson, 2001: 351). Only though solitude we can escape the pressure of ordinary life and renew ourselves (Storr, 1988: 35).

There is also imposed solitude, that is culturally developed and described by loneliness, while solitude by choice is consciously and naturally exercised, aligned with biological instincts it derives from (Buchholz, 1999).

Starting from the states of mind and the environment we choose to be alone in, we can benefit from seven solitude types: self-discovery, anonymity, inner peace, creativity, problem solving, intimacy and spirituality (More and Long, 2004). These types of solitude are crucial for "[psychological rewards and simple restoration, cognitive and social freedom required for self-reflection and significant connection to internal and external reality]" (Naor and Mayseless, 2020: 13).

### 3.1.2 Autonomy – The Second Source Of Privacy

In legal studies autonomy is perceived as a social phenomenon of "self-government" (Oshana 2006). Meanwhile the natural studies refer to it as to intelligent autonomy, identified with a sense of "exploring alternatives". This sense is also found in less developed mammals, and is about choosing the "best strategy for rich and successful survival reconciling spontaneous exploration with intelligent reflection, while avoiding libertarian mysteries and authenticity muddles" (Waller, 1993: 75).

Others see autonomy as biologically rooted in our instincts and desire for control - "we are born to choose" (Leotti, Iyengar and Ochsner, 2010: 7). And although we exercise it consciously and instinctively, it is present in other mammals too as a natural desire for control over the self and their extensions.

Not only this, but "[the desire to exercise control, and make choices, is paramount for survival]" (Leotti, Iyengar and Ochsner, 2010: 8). And although nowadays we mostly exercise autonomy in social contexts, autonomy is vital for survival even in isolation, and exercised every time we are in a position to choose for our own good.

Like solitude, regulating other's access to the self is biologically rooted. It comes from the need to self-govern and decide the ways to survive, thrive, self-organize and develop (Collier, 2002). And when anyone decides to interfere in our activities, they breach individual autonomy (Humbolt, 1969; Mill, 1915, apud Hurka, 1987). By participating in others' activities without consent, even by simple observation, we deprive them of the possibility to choose on how to manage their personal, private

matters, and on who can possess information about their personal life; we "[block alternative choices]" (Waller, 1993: 78).

Hence, privacy also derives from autonomy, as an extension of it.

### 3.2 The Cognitive Character Of Online Privacy

To understand how privacy is understood and managed in online we formulate the following secondary hypothesis (*SH2): Online privacy management is primarily a cognitively driven activity.* And we test it by studying how the online feedback tools are used for evaluating levels of online privacy and raising awareness on privacy breaches.

In the real life we have real-time disclosure feedback - a set of naturally learned skills allowing us to read people's reactions and evaluate if the information we share is appropriate, enough, or too much. But in online, we lack such tools and blindly adjust privacy, sometimes sharing more information to a larger public than the intended one (Per and Chialvo, 2000).

Not only this, but the tools we use for privacy management shape in us a specific culture of privacy. In the real-life, for example, our privacy boundaries depend on biological learning, local culture and life experience. But the online feedback tools, disconnected from natural instincts, build a privacy culture focused on human curiosity and pressure for more disclosure and social trends for normalizing privacy intrusion (Westin, 1967).

In the real-life, we learn privacy measures in early childhood (Solberg, 2023), that help us project automated easy to adjust privacy limits. But in online, where privacy adjustment requires continuous learning of complex, abstract concepts and the functionality of privacy tools (Prince, Omrani and Schiavone, 2024), and where awareness of privacy breaches is cognitively dependent, making informed decisions about privacy can be hard.

This shows the disconnection of online communication models from the real-life ones, and a privacy culture based on incomplete or misleading feedback.

Moreover, the constantly changing nature of the online environment, highlights that even if more feedback tools were available, the privacy management will not be an intuitive and easy process as in the real life where we adjust privacy limits based on various levels of connection, trust, context, sensibility, the nature of conversation, etc.

In this sense, the way people communicate in online and use to adjust privacy has been affected because the online 'way of doing things' "has stripped the social environment of many of the cues required to trigger people's intuitions regarding privacy violation" (Shariff, Green and Jettinghoff, 2021: 161). In online we count only on cognitive mechanisms for privacy alerts. But then, other privacy concerns arise in the context of data accessibility. For example, when no specific privacy settings are activated, people believe the accessible data from the social networks is free to use. But it is not necessarily the case for most social media users, who do not understand the implications of information accessibility (Loewenstein, 2015). Also, given the main purpose of social media platforms - to ease and encourage communication - the users address their personal information to their audience, that is significantly smaller than it really is. While in reality, the social media audience involves "ad networks, ad servers, measurement and analytics services, sharing data/social tools, and so on" (Guarino, Malandrino and Zaccagnino, 2022: 2).

Thus, new actors and interests arise on social media, and with them, new learning effort is required to understand potential privacy breaches. But this learning

process is time consuming and cognitively demanding, thus leaving many users vulnerable to privacy breaches (Coopamootoo, 2020). Because when privacy management depends so much on our ability to master these constantly changing concepts and tools, it becomes difficult not only to adjust our own privacy boundaries, but also to understand how well others manage theirs and how much of the publicly available information is really free to use.

### 3.3 The Privacy Paradox And The Internal Conflict

Petronio (2002) analyzed the privacy paradox in terms of privacy boundaries, and described it as conflict between our natural needs for privacy and the social pressure for disclosing more personal information and gaining access to us. And Brown described it as a phenomenon where "[people presenting general worries about privacy, are also willing to lose that privacy for very little gain]" (Brown, 2001: 18).

Nowadays, the paradox applies especially to the online context, describing contradictory actions derived from human natural instincts for protecting personal information, and from the new socialization practices requiring constant connectivity and personal data availability.

Yet, Acquisti, Brandimarte and Loewenstein (2015) specified that this paradox is present both in online and the real life, and has its roots in the beginning of the humanity when people tried to control others' access to the self and their territory. This social pressure for disclosure came from communities' desire for knowledge for members' safety. In time, this pressure deepened until the individual privacy boundaries dissolved to the point where we do not have enough alone time.

Different from the above authors, Hargittai and Marwick (2016) sustain that the privacy paradox is an illusion because in online, what seems to be a privacy paradox is nothing more than user behavior limited by tools for managing privacy as easily and efficiently as in the real life.

Similarly, Solove argued that the privacy paradox is a myth based on faulty logic, because for it to be true there must be a contradictory behavior, but he shows that "people's behaviors and attitudes regarding data privacy do not contradict one another" (Solove, 2021: 50). It is simply that behaviors and attitudes are not easy to align, and also, they do not reflect the true desire of people.

In this sense, Dienlin, Masur and Trepte (2023) analyzed the different levels of privacy concerns, the level of shared information, and the privacy long-term effects of online sharing. The results showed no contradictory behavior, namely, the people who were more concerned about their privacy, shared less information, and those less concerned - shared more.

Yet, one aspect that created the illusion of this paradox was not clarified, namely the repeated privacy breaches and the learned helplessness (Shklovski et al., 2014, apud Barth and de Jong, 2017: 1049).

The privacy breaches challenge individuals' autonomy and all natural rights and needs deriving from it (Parchomovsky and Stein, 2020). Although we may not always make a choice, we do need to know that we have one (Leotti, Iyengar and Ochsner, 2010). And in this sense, understanding the privacy paradox was crucial for managing privacy boundaries in online.

So, we formulate the following secondary hypothesis (*SH3): The cognitive burden of online privacy management and lack of effective tools creates internal autonomy conflicts, leading users to internalize helplessness as normal.* And for testing it

we study people's capacity to work with the online privacy management tools and the impact of these new habits on the way people adjust privacy in the real life.

## 4. Methodology

We start this study with the document analysis to identify the research gap and highlight the existing definitions and approaches to privacy.

Then we use the observation and the comparison research methods to find different perspectives on privacy, and to distinguish between individual and social perceptions of personal space.

To differentiate better between real-life and online privacy, we used the *a contrario* method.

In the second part of the study, we concentrate on empirical research, and focus on the Romanian case-study. We designed an anonymous questionnaire with emotional and behavioral insights on Google Surveys, with open-ended and multiple-choice questions. It was distributed to Romanians over 18 on Facebook and Instagram. The data was collected between March 27, 2023 and May 19, 2023.

The data was organized and analyzed with the help of Google Surveys' analytical tools.

### 4.1 Participants Selection

To select the participants, we used a purposive-random approach. Initially we performed a search on social media platforms for Romanian community groups by using the following keywords: "Români" and "Romania". Then, we analyzed users publicly available information to identify participants that fit the selection criteria: Romanians over 18 across all adult age groups, with social media profiles resembling to a real person, by considering the name, used language, visible location, and posted content.

The profiles meeting the selection criteria were contacted through a message and invited to participate in the study. Participation was voluntary, and informed consent was obtained at the beginning of the survey.

### 4.2 Participants Demographics And Study Limits

We disseminated the questionnaire to 1253 people on Facebook and 82 on Instagram. This brought us 111 filled questionnaires, meaning a response rate of 8.2%.

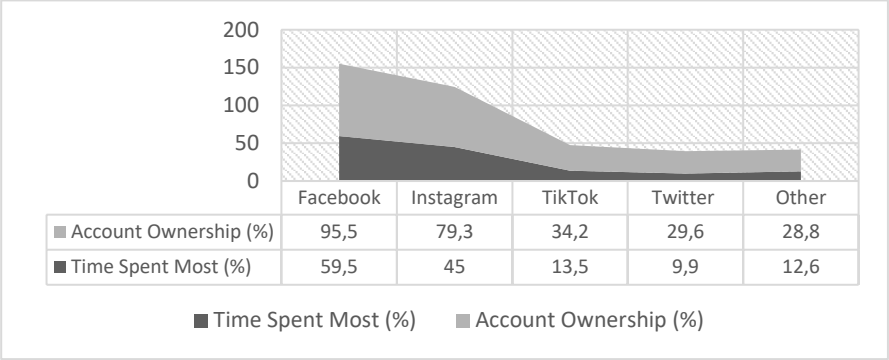
Of the received results, 53.2% represent the women's perspective and 46.8% that of men. Also, from all respondents, 41.8% are between 18 and 30 years old, 31.5% between 30 and 40, 18% between 40 and 50, and 9% are over 55 years old.

In matter of education, 81.9% have a higher education degree: 27% have a bachelor's degree, 36% have a masters' degree, and 18.9% have doctoral studies. Thus, the data presented in this study underlines the opinion of the highly educated segment of the Romanian society. But since this segment represents only 15.1% of the total Romanian population (Pop, 2023) it cannot be generalized to the whole country. Also, the results represent only 9% of the elderly population.

## 5. Study Findings

To understand how our study participants perceive privacy in online, what aspects of the online activity can serve as a source of internal conflict, and their awareness of the changing privacy tools, initially, we focus on highlighting the platforms they prefer to spend more time on (see Figure 1).

**Figure 1: Time repartition on social media platforms**



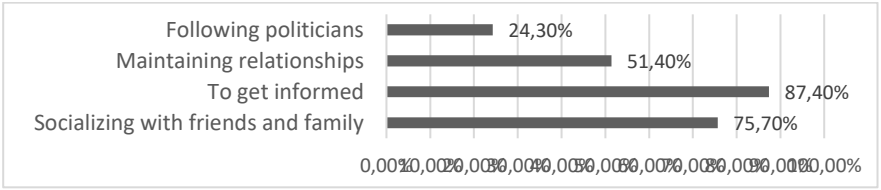

*Source: Author's figure*

The results show that Facebook and Instagram are the most used platforms, followed by TikTok, Twitter and others. Then, interested in the way these platforms are used, we ask our participants if they identify themselves with social media content creators or consumers. And we find that 52.3% are mostly content consumers, 43.2% are both content consumers and creators, and 4.5% post what is important for them and others.

Then we focus on understanding to whom is their social media information addressed, and we found that from the ones identifying themselves with social media consumers, 31.5% do not post too much, 5.4% address their posts to their families and those interested, 36.9% post for everyone from their friends' list, and 26.1% post for everyone interested.

This brought us to the next topic, namely, the main use of social media (see Figure 2).

**Figure 2: Primary uses of social media**



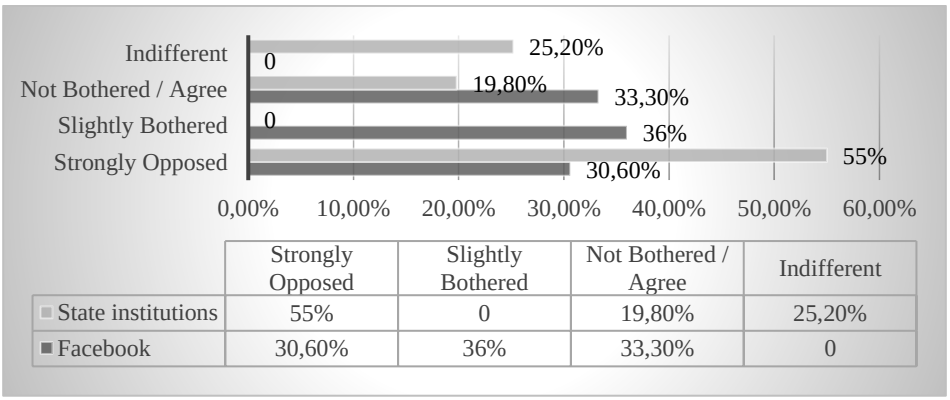

*Source: Author's figure*

The results show that the content consumers used the social media mostly to get informed, socialize with their family and friends, and to maintain relationships. And in this context, we focused further on the privacy settings, and asked to whom are their personal information such as their birthday, the birthplace, current residency, the phone number, past and current jobs available. The answers show that 12.6% did not change their initial default settings, 35.1% have set for this information to be visible only to themselves, 44.1% made it available to their friends' list, 7.2% to their friends and friends' friends list, and 9% have intentionally left this information visible to everyone interested in them.

With this in mind, we concentrate on participants' awareness regarding the visibility of their engagement with ads and commercial content, and asked if they agree for this information to be visible to everyone. 18.9% said yes, 56.8% do not agree for this information to be visible to others, and 24.3% do not consider this information to be personal. Yet, when asked if they would change the privacy settings to protect this information, 43.6% said they adjusted them in this sense a long time ago, 32.7% do not mind others accessing this information, and 23.6% intend to modify the settings right away.

To explore further our participants' awareness and feelings regarding their online activity and privacy, we asked them if they knew that Facebook monitors their activity on other websites they access through Facebook login. 86.5% knew this aspect, while 13.5% did not. So, we asked how they feel about Facebook tracking their activity on other sites and collecting information about it, and if they agree for the state institutions to collect their data for information updates and designing public policies (see Figure 3).

**Figure 3: Data collection preferences - Facebook vs. state institutions**




| | Strongly Opposed | Slightly Bothered | Not Bothered / Agree | Indifferent |
|---|---|---|---|---|
| State institutions | 55% | 0 | 19,80% | 25,20% |
| Facebook | 30,60% | 36% | 33,30% | 0 |

*Source: Author's figure*

The results show that our participants opposed more for the state institutions to collect data from their social media profiles than Facebook. So, we asked who can access their data from social media. 40.5% prefer for their data to be accessed by those who want to know them, 14.4% by state institutions and NGO's, 18.9% by potential employers, and 41.4% do not have a specific preference.

Knowing this, we focus on participants' desire for their consent being asked if their social media data is being collected. The results show that 35.1% consider that advertising agencies should ask for their consent when collecting their data, 31.5% would like the state agencies to ask for their consent when collecting data for impact studies, 76.6% think that anyone collecting their data for anything else than getting to know them should ask for consent, and 12.6% have no preferences in this sense.

With all this, when asked how their personal information from the social media should be approached, 85.6% answered that all personal information belonging to them requires consent for usage outside the purpose of social media platforms, and 14.4% consider their data can be accessed freely since it is public.

In this context we asked our participants about their feelings on institutions, groups, firms, and researchers collecting their public information from social media for

marketing strategies, studies, selling products and services. The answers show that 26.1% consider this normal because the platforms are free to use, 8.1% consider this normal because everybody does so, 20.7% consider this to be a lack of esteem since their information is there to ease the socialization process, 18% consider it to be a lack of esteem because the information is there for a different purpose, and 27% do not like this but are not bothered by it either.

## 6. Discussion

From the collected data we identify four stages of awareness in our study participants: 1) The perceived social media public and privacy limits; 2) Realizing the personal character of other type of information deriving from online activity; 3) Accepting and normalizing helplessness to temper interior authority conflicts, and 4) Expecting compliance with privacy limits in data usage outside social media purpose.

We observe the first stage when studying how the participants identify themselves, what they think their social media content is, and whom this content reaches. And we found that the majority of participants identify as content consumers because they post rarely or not at all. A control question shows that 75.7% use social media to get informed and maintain relationships with family and friends, considering content creation for a larger audience only afterward. In addition, they believe that information such as their birth date and place, work, and family members is protected by their privacy settings and visible only to themselves, friends, and friends' friends.

But, when discussing ads and commercial pages, our participants realized the other types of actors that can access their information, and the private nature of other kind of information. These aspects show them their vulnerability to privacy breaches.

Then, because 43.6% of the participants believe their information is protected by the privacy settings, and 32.4% are not bothered to share the information resulting from their interaction with ads and commercial pages, we focus on their awareness and feelings when this information is collected by Facebook anyway. And we find that although 86.5% are aware of this action, a large majority (66.6%) are bothered by it, and 58.6% prefer for their public information to be collected only by NGO's and persons interested in connecting with them.

Next, we explore participants' authority conflicts and found that 85.6% consider that personal information belongs to them and any use must come with a required consent. Yet, 36.2% consider the privacy breaches normal because of their commonality and the free to use platforms. 27% normalized privacy breaches because they think they cannot do anything about it, and 38.7% are bothered by privacy breaches since their information is on social media for another purpose.

After the participants realized the constancy of privacy breaches, we question their natural privacy preferences to understand their expectations regarding others' approach towards their social media information. 85.6% consider that their information belongs to them and any use must come with a required consent, and 76.6% think that any use of their data outside getting to know them presents a breach of privacy.

## 7. Conclusions

In this study we treated a privacy conceptual gap and a practical issue of approaching privacy in online efficiently. To solve these issues, we focused on the real-life privacy and its intuitive nature, and then on analyzing the cognitive aspects of the online privacy.

The theoretical findings show that in real life, privacy is a natural state of the individual, inherently and intuitively exercised, while in online, privacy management is a cognitively based process that requires specific effort and time for learning. This is the reason why building efficient online privacy management routines is almost impossible. With all this, users build several online surfing routines that may give them a sense of privacy. Yet, because in online users rely on cognitive mechanisms for alert, they remain vulnerable to privacy breaches.

Through the Romanian case-study we identify several stages in how users understand and react to privacy breaches in online. At first, we find that online privacy breaches are linked to the public perception of privacy; then, we observe the cognitively dependent process of privacy management; after that, we notice the internalized helplessness and the commonality of privacy breaches in online alongside an expectation of social conformity with a common sense of online privacy, although no specific settings are configured.

The differences between real life and online management of privacy, and the difficulty to accurately manage the privacy boundaries, raise a state of internal conflict in our study participants, who fluctuate between the desire for social conformity and maintaining personal relationships, and the need for autonomy and desire for control.

Starting from these findings, we recommend that future studies focus on the perception, emotional responses, and behavioral dimensions of online privacy among the less-educated segment of society. Assessing their level of awareness, capacity, and understating of privacy concepts and tools would help us see clearer how privacy is understood in online, building digital literacy policies and privacy education initiatives.

**Data Availability Statement:**

The research data for this study is available at this link: doi.org/10.6084/m9.figshare.31342369

**References:**


1. Acquisti, A., and Brandimarte, L. (2015). Privacy and human behavior in the age of information. *Science, 347(6221),* pp. 509-514, doi.org/10.1126/science.aaa1465
2. Alibeigi, A., Munir, A. B., and Karim, E. (2019). Right to Privacy, a Complicated Concept to Review. *Library Philosophy and Practice,* pp. 1-36, dx.doi.org/10.2139/ssrn.3537968
3. Barth, S., and de Jong, M. (2017). The privacy paradox – Investigating discrepancies between expressed privacy concerns and actual online behavior – A systematic literature review. *Telematics and Informatics, 34 (7)*, 1038-1058, doi.org/10.1016/j.tele.2017.04.013
4. Bennett, C. (1991). Computers, personal data, and theories of technology: Comparative approaches to privacy protection in the 1990s. *Science, Technology, & Human Values, 16(1),* pp. 51-69, doi.org/10.1177/016224399101600103
5. Brown, B. (2001). Studying the Internet Experience. *Publishing Systems and Solutions Laboratory,* pp. 1-23, Available at: shiftleft.com/mirrors/www.hpl.hp.com/techreports/2001/HPL-2001-49.pdf
6. Buchholz, E. (1999). *The call of solitude: Alone time in a world of attachment*. New York: Simon and Schuster.
7. Callo, R. (2011). The boundaries of privacy harm. *Indiana Law Journal, 86(1),* pp. 1-31, Available at: repository.law.indiana.edu/ilj/vol86/iss3/8
8. Cambridge Dictionary (2025). Privacy. Retrieved from Cambridge Dictionary: dictionary.cambridge.org/dictionary/english/privacy
9. Collier, J. (2002). What is autonomy. *Computer Science, Philosophy,* pp. 1-10, Available at: web-archive.southampton.ac.uk/cogprints.org/2289/
10. Coopamootoo, K. (2020). Dis-Empowerment online: An investigation of privacy-sharing perceptions & method preferences. *AsiaUSEC'20, Financial Cryptography and Data Security 2020 (FC)*. Sabah, Malaysia: Springer, pp. 1-13.
11. Dienlin, T., Masur, P., and Trepte, S. (2023). A longitudinal analysis of the privacy paradox. *new media & society, 25 (5),* pp. 1043-1064, doi.org/10.1177/14614448211016316
12. Elson, M. (2001). Silence, its use and abuse: A view from self-psychology. *Clinical Social Work Journal, 29,* pp. 351-360, doi.org/10.1023/A:1012215213461
13. Gaebler, R. (1992). Is there a natural law right to privacy? *American Journal of Jurisprudence, 37*, pp. 319-336, Available at: repository.law.indiana.edu/facpub/656
14. Geest, S. (2018). Privacy from an anthropological perspective. In B. van der Sloot & A. de Groot (Eds.), *The handbook of privacy studies: An interdisciplinary introduction.* Amsterdam: Amsterdam University Press (pp. 413-444).
15. Guarino, A., and Malandrino, D. (2022). An automatic mechanism to provide privacy awareness and control over unwittingly dissemination of online private information. *Computer Networks, 202 (108614),* doi.org/10.1016/j.comnet.2021.108614

16. Guglielmo, S. (2015). Moral judgment as information processing: an integrative review. *Frontiers in Psychology, 6 (1637),* pp. 1-19, doi.org/10.3389/fpsyg.2015.01637
17. Hargittai, E., and Marwick, A. (2016). "What can I really do?" Explaining the privacy paradox with online apathy. *International Journal of Communication, 10,* pp. 3737-3757, Available at: ijoc.org/index.php/ijoc/article/view/4655/1738
18. Hurka, T. (1987). Why value autonomy? *Social Theory and Practice, 13(3),* pp. 361 – 382, Available at: jstor.org/stable/23556617
19. Jarvis Thomson, J. (1975). The right to privacy. *Philosophy & Public Affairs, 4(4),* pp. 295-314, Available at: jstor.org/stable/2265075
20. Kahneman, D. (2011). *Thinking fast and slow*. Penguin Random House.
21. Koops, B.-J., et al. (2017). A typology of privacy. *U. Pa. J. Int'l L., 38(2),* pp. 483-575, Available at: papers.ssrn.com/sol3/papers.cfm?abstract_id=2754043
22. Kvande, M.E., et al. (2021). Ethical dilemmas embedded in performing fieldwork with nurses in the ICU. *Nursing Ethics, 28 (7-8),* pp. 1329-1336, doi.org/10.1177/0969733021996025
23. Kwasny, M., et al. (2008). Privacy and technology: Folk definitions and perspectives. *Proc SIGCHI Conf Hum Factor Comput Syst. HHS Public Access,* pp. 3291-3296, doi.org/10.1145/1358628.1358846
24. Leotti, L., Iyengar, S., and Ochsner, K. (2010). Born to choose: The origins and value of the need for control. *Trends in Cognitive Sciences, 14(10)*, pp. 457-463, doi.org/10.1016/j.tics.2010.08.001
25. Margulis, S. (2003). Privacy as a social issue and behavioral concept. *Journal of Social Issues, 59(2),* pp. 243- 261, doi.org/10.1111/1540-4560.00063
26. Moore, A. (2007). Toward informational privacy rights. *San Diego Law Review, 44,* pp. 811-844, Available at: digital.sandiego.edu/sdlr/vol44/iss4/8
27. Moore, A. (2012). Defining privacy. *Journal of Social Philosophy, 39 (3),* pp. 411-428, Available at: faculty.washington.edu/moore2/DP.pdf
28. More, T., and Long, C. (2004). Solitude, nature and cities. In Murdy James (Ed.), *Proceedings of the 2003 Northeastern Recreation Research Symposium.* Bolton: USDA Government (224 – 229).
29. Naor, L., and Mayseless, O. (2020). The wilderness solo experience: A unique practice of silence and solitude for personal growth. *Frontiers in Psychology, 11,* pp. 1-15, doi.org/10.3389/fpsyg.2020.547067
30. Nissenbaum, H. (2004). Privacy as contextual integrity. *Washington Law Review, 79 (1),* pp. 119-158, Available at: digitalcommons.law.uw.edu/wlr/vol79/iss1/10
31. Oshana, M. (2006). *Personal autonomy in society 1st ed*. London: Routledge.
32. Oxford English Dictionary (2025). Privacy. Retrieved from Oxford English Dictionary: oed.com/dictionary/privacy_n?tab=factsheet#28424823
33. Parchomovsky, G., and Stein, A. (2020). Autonomy. *University of Toronto Law Journal, 71 (1),* pp. 1-43, doi.org/10.3138/utlj.2019-0113
34. Pop, M. (2023). Procentul românilor cu studii superioare a crescut simbolic în ultimii cinci ani. Edupedu, Available at: edupedu.ro/procentul-romanilor-cu-studii-superioare-a-crescut-simbolic-in-ultimii-cinci-ani-crestere-usor-mai-pronuntata-in-bucuresti-in-timp-ce-unele-regiuni-procentul-a-scazut/

35. Prince, C., Omrani, N., and Schiavone, F. (2024). Online privacy literacy and users' information privacy empowerment: the case of GDPR in Europe. *Information Technology & People, 37(8),* pp. 1-24, doi.org/10.1108/ITP-05-2023-0467
36. Saltzer, J., and Schroeder, M. (1975). The protection of information in computer systems. *Proceedings of the IEEE, 63 (9),* pp. 1278-1308, doi.org/10.1109/PROC.1975.9939
37. Shariff, A., Green, J, and Jettinghoff, W. (2021). The privacy mismatch: Evolved intuitions in a digital world. *Current Directions in Psychological Science, 30(2),* pp. 159-166, doi.org/10.1177/0963721421990355
38. Solberg, J. (2023). Privacy in early childhood education and care: The management of family information in parent–teacher conferences. *Human Studies, 47(2),* pp. 1-22, doi.org/10.1007/s10746-023-09683-5
39. Stavros, B. (2015). The philosophy of solitude. *ENCEPHALOS, 52,* pp. 14-24, Available at: academia.edu/12465161/The_philosophy_of_solitude
40. Storr, A. (1988). *Solitude: A return to the self.* New York: Free Press.
41. Thomas, E., and Fink, C. (1963). Effects of group size. *Psychological Bulletin, 60(4),* pp. 371-384, psycnet.apa.org/doi/10.1037/h0047169
42. Waller, B. (1993). Natural autonomy and alternative possibilities. *American Philosophical Quarterly, 30(1),* pp. 73-81, Available at: jstor.org/stable/20014444
43. Warren, S., and Louis, B. (1980). The right to privacy. *Harvard Law Review, 4(5),* pp. 193-220, Available at: scispace.com/pdf/the-right-to-privacy-1npio8rvhl.pdf
44. Westin, A. (1966). Science, privacy, and freedom: Issues and proposals for the 1970's. Part II: Balancing the conflicting demands of privacy, disclosure, and surveillance. *Columbia Law Review, 66 (7),* pp. 1205-1253, doi.org/10.2307/1120983
45. Westin, A. (1967). *Privacy and Freedom.* New York: Ig Publishing.

# Before the Welfare State: The Social Functions of the Byzantine Church

**Protosyngellos Rafael (Marius STANCIU)**
"Ovidius" University of Constanta, Doctoral School of Theology (Romania)
Email: rafael.protos@gmail.com

***Abstract:*** *This article examines the social functions of the Byzantine Church before the emergence of the modern welfare state, with particular emphasis on the relationship between ecclesiastical action and imperial authority. The study is situated at the intersection of historical sociology, social policy history and Church-State studies. It uses a qualitative and conceptual methodology, based on the synthesis of scholarship concerning Byzantine philanthropy, hospitals, orphanages, poor relief, monastic foundations and imperial patronage. The main argument is that the Byzantine Church acted not only as a spiritual institution, but also as a social institution that contributed to the care of the sick, the poor, the elderly, strangers and orphans. These forms of assistance were not identical to modern welfare rights, because they were rooted in Christian charity, hierarchy and benefaction rather than in universal citizenship. Nevertheless, they fulfilled essential social functions: relief, protection, mediation, moral integration and social stabilization. The Byzantine case therefore illustrates an early model of institutionalized social assistance in which Church and State did not operate as separate spheres, but as mutually reinforcing structures of authority.*

***Keywords:*** *Byzantine Church; welfare state; philanthropy; Church-State relations; social assistance*

## 1. Introduction

The quality of life and well-being of community members have historically represented a central concern of human societies, regardless of their institutional, political, or ideological organization (Otovescu, 2026). Although the principles, actors, and mechanisms of assistance have varied considerably across time and civilizations, societies have continually developed forms of solidarity, protection, and care intended to respond to poverty, illness, dependency, and social vulnerability.

The history of social welfare is often narrated as a specifically modern history. In this common interpretation, social assistance becomes institutional only when the modern state creates public budgets, ministries, insurance systems, social rights and professional bureaucracies. Such an interpretation is useful, but it is also incomplete. Long before the emergence of the modern welfare state, religious institutions assumed social responsibilities that were more than occasional acts of private generosity. In the Byzantine world, the Church developed a remarkable capacity to organize, legitimize and administer forms of care for people who were sick, poor, elderly, orphaned, displaced, imprisoned, widowed or socially vulnerable (Brown, 2002: 45; Constantelos, 1991: 112).

This article approaches the Byzantine Church from the perspective of social function. It does not reduce the Church to a theological, liturgical or doctrinal institution, although these dimensions remain fundamental for understanding its identity. Rather, it interprets the Church as an actor situated within a broader political and social system, in which imperial authority, ecclesiastical hierarchy, monasteries, wealthy donors and local communities cooperated in the organization of assistance. The Byzantine Church was not a welfare state in the modern sense, and the article deliberately avoids this anachronism. Yet the institutions connected with Christian

charity performed functions that would later become central to modern welfare systems: care of the sick, protection of orphans, relief for the poor, food distribution, hospitality and support for the elderly (Constantelos, 1991: 112; Miller, 1997: 74).

The title, Before the Welfare State, is therefore not meant to suggest that Byzantium possessed a modern social state. It indicates a functional comparison. The Byzantine case shows that social protection may exist before modern social rights and that it may be organized through a religious-political synthesis rather than through a secular bureaucracy. The Byzantine Church acted within a world in which spiritual authority and imperial power were deeply intertwined. This connection is particularly important for the study of Church-State relations, because social assistance was one of the fields in which the cooperation between the two institutions became visible, practical and socially meaningful (Horden, 2005: 370; Risse, 1999: 123).

The central research question is the following: how did the Byzantine Church fulfil social functions before the emergence of the modern welfare state, and what does this reveal about the relationship between Church and State? The answer proposed here is that the Byzantine Church operated as a mediator between Christian morality, imperial responsibility and social vulnerability. Its charitable institutions were not isolated gestures of compassion, but elements of a wider order in which poverty, illness and dependence were interpreted both spiritually and politically. To care for the vulnerable meant to imitate divine mercy, but also to sustain the moral legitimacy of Christian rule.

From a functional perspective, certain Byzantine monasteries may also be regarded as historical precursors of what is now described as the social economy and, more specifically, work-integration initiatives. Although they were not social enterprises in the modern legal sense (Otovescu, Calotă and Cioacă, 2019), monastic communities combined collective production, shared resources, social protection and the inclusion of individuals who might otherwise have remained economically or socially marginalized. Through agricultural work, crafts, caregiving and other communal activities, members were assigned roles according to their abilities and incorporated into a structured community that provided subsistence, belonging and social utility. Monasteries therefore did not merely offer charitable relief, but also created environments in which vulnerable persons could participate actively in collective economic and social life.

The relevance of this topic for contemporary scholarship lies in the fact that welfare is not only a technical question of social policy. It is also a question of institutional authority, moral imagination and social integration. Modern welfare states normally justify social assistance through citizenship, taxation and public law. Byzantium justified assistance through Christian philanthropy, imperial piety and ecclesiastical responsibility. The difference is substantial, but the comparison is fruitful because it allows us to observe how different civilizations have organized care, dependence and solidarity (Brown, 2002: 45; Laiou, 2002: 1083).

The article is structured in several parts. The first part clarifies the methodological and conceptual framework. The second part presents the Byzantine Church as a social institution. The third part examines the main forms of assistance, including hospitals, orphanages, homes for the elderly, shelters and food distribution. The fourth part analyzes the cooperation between Church and State. The fifth part discusses the social functions of these institutions, while the final sections compare the

Byzantine model with the welfare state and underline its relevance for the study of Church-State relations.

## 2. Methodological and Conceptual Framework

The study uses a qualitative and conceptual methodology based on the synthesis of historical and sociological scholarship. Its aim is not to reconstruct the administrative history of a single hospital, monastery or charitable foundation, but to identify the social functions performed by the Byzantine Church within the broader structure of the empire. The approach is therefore interpretive: it reads institutions of charity as signs of a social order in which religion and political authority were not separated into autonomous domains (Constantelos, 1991: 112; Miller, 1997: 74; Thomas and Hero, 2000: 58).

The concept of social function is used here in a sociological sense. A social function refers to the contribution made by an institution to the organization, reproduction or stabilization of a society. In the Byzantine case, charitable institutions had visible practical functions: they provided beds, food, medicine, shelter or protection. At the same time, they had symbolic functions: they expressed Christian mercy, demonstrated imperial piety, created bonds between donors and beneficiaries, and made the Church present in the everyday life of vulnerable groups. This combination of practical and symbolic action is essential for understanding Byzantine philanthropy (Brown, 2002: 45).

The term welfare state is used comparatively and with caution. A modern welfare state presupposes legal entitlement, centralized administration, fiscal redistribution and a political understanding of social rights. Byzantium did not operate with this conceptual vocabulary. Its assistance was selective, hierarchical and often dependent on charity, patronage and local foundations. Nevertheless, the Byzantine Church and the imperial administration developed institutions that provided organized help to categories of people who would later become central to welfare policy: the sick, the poor, the elderly, abandoned children, widows and strangers (Laiou, 2002: 1083; Risse, 1999: 123).

The expression Church-State relations must also be treated carefully. In the Byzantine context, the relationship between ecclesiastical and imperial authority cannot be understood through the modern model of institutional separation. The emperor was not a priest, and bishops were not state officials in the narrow modern sense, but both forms of authority belonged to a Christian imperial order. The Church prayed for the emperor, the emperor protected orthodoxy, and both participated in the moral organization of society. Social assistance was one of the areas in which this cooperation became institutionalized (Troianos, 2012: 145; Magdalino, 1993: 229).

This article therefore avoids two extremes. The first would be to romanticize Byzantine charity as if it were a perfect and universal system of social protection. The second would be to dismiss it as merely symbolic or accidental because it was not modern. A more balanced interpretation recognizes both its limits and its achievements. Byzantine welfare was not a system of equal social rights, but it was more than private almsgiving. It created durable institutions, administrative routines and a Christian language of responsibility toward the vulnerable.

The analysis draws on scholarship concerning Byzantine philanthropy, hospitals, monastic foundations, poor relief and imperial patronage. Authors such as Demetrios Constantelos, Timothy Miller, Peter Brown, Peregrine Horden and others

have shown that late antique and Byzantine Christianity transformed the social meaning of poverty and institutionalized new forms of care. Their work allows a sociological reading of the Church as an institution that mediated between doctrine, material resources and social need (Brown, 2002: 45; Constantelos, 1991: 112; Miller, 1997: 74).

### 3. The Byzantine Church as a Social Institution

The Byzantine Church was, first of all, a religious institution. Its central mission concerned salvation, worship, doctrine, sacramental life and the preservation of orthodox faith. However, in a society where religion shaped public meaning, the Church was also a social institution. It possessed buildings, land, personnel, legal privileges, networks of communication, moral authority and a permanent presence in cities and villages. These resources allowed it to intervene in social life in ways that went far beyond the liturgical sphere (Constantelos, 1991: 112; Brown, 2002: 45).

The bishop was a central figure in this process. In many cities, the bishop acted not only as a religious leader but also as a protector of the poor, a mediator in conflicts and a representative of local Christian identity. The bishop's duty to care for the weak was not an optional virtue but an element of pastoral authority. To lead the Christian community meant to guard its faith and also to respond to the suffering of its most vulnerable members. This role continued earlier late antique developments in which episcopal authority became increasingly connected with poor relief (Brown, 2002: 45; Troianos, 2012: 145).

Monasteries also played a decisive social role. They were places of prayer and ascetic discipline, but many of them also functioned as centers of hospitality, food distribution, care for travelers and protection for people in distress. Monastic typika, or foundation documents, often regulated not only the spiritual life of a community but also its economic management and charitable obligations. In this respect, the monastery could become a small social economy, combining worship, labor, property administration and assistance (Thomas and Hero, 2000: 58; Constantelos, 1991: 112).

The social role of the Church was supported by a theological vision of charity. Philanthropy was not understood merely as emotional kindness. It was connected with the imitation of God's mercy, the command to love one's neighbor and the eschatological value of caring for Christ in the person of the poor. The sick, the hungry and the abandoned were not simply marginal people; they were bearers of moral significance. Helping them was a way of participating in divine compassion and of confirming the Christian identity of the community (Constantelos, 1991: 112).

At the same time, the Church's social activity cannot be separated from material resources. Charity requires organization. Hospitals needed buildings, beds, supplies, physicians, servants and administrators. Orphanages required funds, food, supervision and legal protection. Feeding the poor presupposed storage, distribution and economic support. The Church could fulfil these tasks because it was embedded in systems of property, donation and patronage. Wealthy Christians, imperial officials, empresses, bishops and monks contributed to the creation of institutions whose religious purpose was inseparable from their social usefulness (Laiou, 2002: 1083; Thomas and Hero, 2000: 58).

The Byzantine Church therefore illustrates a form of institutional religion that was also a form of social administration. Its authority was not limited to preaching moral values; it created places where these values became visible in practice. A

hospital, an orphanage or a shelter translated theology into institution. This is one of the most important aspects of the Byzantine case: Christian doctrine did not remain only in discourse, but entered the built environment, administrative practice and everyday experience of the empire.

**4. Forms of Byzantine Social Assistance**

The most visible form of Byzantine social assistance was the hospital. The Byzantine hospital did not correspond exactly to the modern hospital, but it was not merely a guesthouse either. Scholarship has emphasized that Byzantine hospitals included organized care, specialized personnel and a clearer medical function than many earlier charitable institutions (Miller, 1997: 74; Horden, 2005: 370). They were often connected with churches, monasteries or imperial foundations, and they reflected the Christian conviction that bodily care and spiritual care belonged together (Miller, 1997: 74; Horden, 2005: 370; Risse, 1999: 123).

Hospitals fulfilled several functions at once. They treated illness, but they also protected the sick person from abandonment. Illness was not only a biological condition; it could produce social exclusion, poverty and dependence. By creating institutions for the sick, the Byzantine Church contributed to the social reintegration of those whose bodies made them vulnerable. In this sense, the hospital was a medical institution, but also a moral and social institution. It recognized that the suffering body remained part of the Christian community (Miller, 1997: 74; Risse, 1999: 123).

Another important institution was the orphanage. The protection of orphaned and abandoned children had both humanitarian and social significance. Children without family support were exposed to poverty, exploitation and social invisibility. Byzantine institutions for orphans attempted to provide care, education and, in some cases, preparation for future social integration. Timothy Miller's research has shown that child welfare in the Christian empire developed through a combination of imperial concern, ecclesiastical action and charitable foundations (Miller, 2003: 116).

Homes for the elderly and shelters for the infirm also formed part of the Byzantine charitable landscape. Old age, disability and chronic weakness could place individuals outside normal structures of economic productivity and family support. The Church's care for such persons expressed the Christian duty to protect those who could no longer protect themselves. These institutions remind us that Byzantine philanthropy did not focus only on temporary poverty, but also on long-term dependency (Constantelos, 1991: 112; Thomas and Hero, 2000: 58).

Food distribution was another essential form of assistance. The poor needed not only institutional placement but also daily survival. Cantines, charitable kitchens and distributions of bread or food functioned as mechanisms of relief, especially in urban contexts where poverty could become visible and politically sensitive. In times of famine, plague or economic crisis, the importance of food relief increased. Stathakopoulos has shown that famine and pestilence deeply affected late Roman and early Byzantine society, creating contexts in which organized assistance became socially necessary (Stathakopoulos, 2004: 121; Constantelos, 1992: 83).

Hospitality toward strangers, travelers and pilgrims was also central. The xenodocheion, often translated as a hostel or guesthouse, illustrates the Christian transformation of hospitality into institution. The stranger was not merely an outsider; he could be understood through biblical and theological categories that made hospitality a religious duty. In a vast empire marked by mobility, pilgrimage,

administration and trade, institutions of hospitality had both spiritual and practical importance (Thomas and Hero, 2000: 58; Constantelos, 1991: 112).

It is important to observe that these forms of assistance were not isolated. A charitable complex might include several functions: care for the sick, shelter for strangers, food for the poor and spiritual support. The social world of Byzantine charity was therefore plural and flexible. Its institutions responded to different forms of vulnerability, but they were united by a common Christian language of philanthropy and by the cooperation of ecclesiastical and imperial authority.

**5. Church and State: Cooperation, Patronage and Legitimacy**

The relationship between Church and State is central to understanding Byzantine social assistance. In the modern world, welfare is often imagined as the responsibility of the state, while religious charity is considered supplementary or private. In Byzantium, this distinction would be misleading. Imperial power and ecclesiastical authority did not function as two completely separate systems. They interacted constantly, sometimes in tension, but often in cooperation. Social assistance was one of the clearest fields of cooperation (Magdalino, 1993: 229; Laiou, 2002: 1083).

The emperor had a special role in this system. As Christian ruler, he was expected to protect the Church, defend orthodoxy and act as a benefactor of the Christian people. Imperial philanthropy was a form of political virtue. By supporting hospitals, monasteries or charitable foundations, emperors and members of the imperial family demonstrated that their authority was not merely military or administrative, but also moral. Ruling meant caring, at least in the symbolic language of Christian kingship (Magdalino, 1993: 229; Constantelos, 1991: 112).

Empresses and aristocratic women could also act as important patrons. The Byzantine tradition includes examples of female patronage in churches, monasteries and charitable institutions. Such patronage had spiritual motives, but it also offered women of high status a recognized public role within the Christian order. Through philanthropy, elite women could participate in the moral and institutional life of the empire, transforming wealth into religious merit and social visibility (Garland, 2009: 156; Thomas and Hero, 2000: 58).

The Church provided the institutional framework through which donations could become stable social practices. A private act of generosity might disappear after the death of a donor, but an ecclesiastical foundation could preserve the donor's intention through rules, property and administration. This explains the importance of typika and testaments. They reveal how spiritual concerns, economic resources and social obligations were linked. A founder might establish a monastery for prayer, but also require hospitality, care for the poor or memorial services that connected charity with salvation (Thomas and Hero, 2000: 58; Laiou, 2002: 1083).

Imperial law and canon law also contributed to the stability of this system. The protection of ecclesiastical property, the regulation of charitable foundations and the moral obligations attached to Christian leadership created a legal and normative environment favorable to organized assistance. The Church did not simply receive donations; it became an institution capable of transforming donations into recurring services. In this sense, ecclesiastical administration played a role that resembles, without being identical to, later welfare administration (Troianos, 2012: 145; Laiou, 2002: 1083).

The cooperation between Church and State also produced legitimacy. For the State, support for charitable institutions demonstrated Christian responsibility and helped soften the inequalities of imperial society. For the Church, involvement in social assistance confirmed its moral authority and deepened its presence in the lives of ordinary people. The poor, the sick and the orphaned were not only beneficiaries; they were also witnesses to the public role of the Church and to the piety of imperial power (Brown, 2002: 45; Constantelos, 1991: 112).

This does not mean that the Byzantine system was free from conflict or limitation. Church and State could disagree over property, jurisdiction, appointments or doctrine. Charitable resources could be unevenly distributed. Assistance could depend on patronage and local conditions. Yet these limitations do not cancel the existence of cooperation. On the contrary, they show that Byzantine welfare was a dynamic field in which power, piety, administration and social need intersected.

From a sociological point of view, this cooperation reveals how premodern societies organized social solidarity without the language of modern rights. The Byzantine poor did not receive assistance because they were citizens of a welfare state, but because Christian society interpreted their need as a moral and religious claim. The State supported this interpretation because it strengthened the Christian identity of imperial authority. The Church administered it because care for the vulnerable belonged to its mission (Brown, 2002: 45).

### 6. Social Functions: Relief, Integration and Social Order

The first social function of Byzantine charitable institutions was relief. Relief refers to the immediate response to suffering: feeding the hungry, treating the sick, sheltering the stranger, protecting the orphan and supporting the elderly. This function is the most visible and the easiest to identify. It shows that Christian philanthropy was not limited to exhortation. It created material responses to material needs (Constantelos, 1991: 112; Miller, 1997: 74).

A second function was protection. Vulnerable persons are not only poor; they are also exposed to social risks. The sick person can be abandoned, the orphan can be exploited, the widow can lose support, the stranger can remain without protection, and the elderly person can be pushed outside the productive order. By organizing institutions of care, the Byzantine Church created protective spaces. These spaces did not abolish vulnerability, but they reduced its most destructive consequences (Miller, 2003: 116; Constantelos, 1992: 83).

A third function was integration. Charity connected marginal persons to the Christian community. The poor were not completely outside the social body; they occupied a morally significant position within it. The Church's charitable activity reminded the community that social belonging was not based only on wealth, productivity or status. The vulnerable also belonged to the body of Christ. This theological idea had social consequences because it challenged indifference and created duties of care (Brown, 2002: 45; Constantelos, 1991: 112).

A fourth function was mediation. The Church mediated between donors and recipients, between imperial resources and local needs, between spiritual ideals and material administration. This mediating role is essential for understanding its social power. The Church could translate wealth into charity, charity into institution and institution into legitimacy. It created channels through which resources moved from

the powerful toward the vulnerable, even if this movement remained selective and unequal.

A fifth function was moral education. Charitable institutions taught society what kind of behavior was considered Christian. They made visible the virtues of mercy, humility, generosity and hospitality. They also reminded elites that wealth carried obligations. In a deeply hierarchical society, philanthropy could become a way of moralizing inequality. It did not eliminate hierarchy, but it required the powerful to justify their position through benefaction and responsibility.

A sixth function was social stabilization. Poverty, hunger and illness can produce unrest, resentment and fragmentation. Organized assistance helped reduce these pressures. Food distribution, hospitals and shelters did not solve all social problems, but they contributed to the maintenance of order. In this respect, charity was not only compassion; it was also a technology of social peace. The Church helped the State by addressing needs that could otherwise threaten cohesion (Stathakopoulos, 2004: 121; Constantelos, 1992: 83).

The stabilizing function of charity should not be interpreted cynically, as if assistance were only a political instrument. In Byzantium, religious conviction and social order were not easily separated. A charitable act could be sincere and still have political consequences. A hospital could express Christian mercy and at the same time strengthen imperial legitimacy. The same institution could care for bodies, save souls, honor donors and stabilize society. This multifunctionality is one of the defining characteristics of Byzantine philanthropy.

The Church's social functions were also connected with time. Some forms of assistance responded to emergencies, such as famine or plague. Others addressed permanent conditions, such as old age, disability or orphanhood. This distinction matters because it shows that Byzantine social assistance was not only reactive. It included durable institutions that anticipated recurring forms of need. The existence of such institutions indicates a level of social organization that goes beyond spontaneous charity.

### 7. Before the Welfare State: Similarities and Differences

The comparison between Byzantine charity and the modern welfare state must be precise. There are similarities at the level of social function, but major differences at the level of principle, administration and entitlement. Both systems address vulnerability. Both create institutions for the sick, the poor, children and the elderly. Both recognize that certain human needs cannot be left entirely to family or market relations. From this functional perspective, the Byzantine Church can be seen as an early organizer of social assistance before the welfare state (Horden, 2005: 370; Risse, 1999: 123).

The differences, however, are equally important. Modern welfare states are grounded in citizenship, law and public policy. They normally define beneficiaries through general categories and administrative procedures. Byzantine assistance was grounded in Christian philanthropy, patronage, ecclesiastical administration and imperial piety. It did not create a universal right to assistance. Access could depend on location, institutional availability, social status, patronage networks and the priorities of founders (Laiou, 2002: 1083).

Modern welfare also presupposes a different understanding of the state. The modern state claims a monopoly over public administration and uses taxation to

redistribute resources. Byzantium had taxation and administration, but social assistance was not centralized in the same way. It emerged from the interaction between imperial authority, Church institutions, monastic communities and private benefactors. The result was a mixed system, neither purely public nor purely private, neither entirely ecclesiastical nor entirely imperial.

Another difference concerns secularization. Modern welfare can be justified without reference to salvation, sin, divine mercy or Christian duty. Byzantine welfare cannot be understood outside these categories. The meaning of assistance was theological. To care for the poor was to imitate Christ, to accumulate spiritual merit, to fulfill Christian commandments and to participate in a moral order oriented toward salvation. This does not make Byzantine assistance less social; rather, it shows that the social was interpreted through the religious.

At the same time, the Byzantine model challenges the assumption that welfare must be secular in order to be institutional. In Byzantium, religious motivation generated institutional forms. The Church's theological vision did not prevent organization; it encouraged it. Hospitals, orphanages and shelters show that religious charity could become administrative reality. This point is important for the sociology of religion because it demonstrates that religious institutions may produce durable social services when they possess resources, authority and organizational continuity (Constantelos, 1991: 112; Miller, 1997: 74).

The concept of before the welfare state is therefore best understood as a historical and analytical bridge. Byzantine charity was not modern welfare, but it addressed problems that remain central to welfare: illness, poverty, dependency, childhood vulnerability, old age and social exclusion. Its study helps us understand that welfare has a deeper and more diverse genealogy than the modern state alone.

## 8. Discussion: Relevance for the Study of Church-State Relations

The Byzantine case is particularly relevant for the study of Church-State relations because it shows that the relationship between the two institutions was not only doctrinal or ceremonial. It was also social. Discussions of Byzantine Church-State relations often focus on councils, emperors, patriarchs, doctrine, iconoclasm or ecclesiastical jurisdiction. These themes are essential, but they do not exhaust the relationship. The social field reveals another dimension: Church and State cooperated in the management of vulnerability (Magdalino, 1993: 229; Brown, 2002: 45).

This cooperation complicates modern categories. If one begins with the assumption that religion belongs to the private sphere and welfare to the public sphere, the Byzantine example becomes difficult to understand. In Byzantium, the care of the poor was a public religious matter. It concerned the emperor because Christian rulership required philanthropy. It concerned the Church because pastoral responsibility included care for bodies as well as souls. It concerned donors because wealth was morally evaluated through generosity. It concerned the poor because assistance could determine survival.

The social functions of the Church also reveal the mutual dependence between ecclesiastical and imperial authority. The Church needed legal protection, property stability and political support. The State needed religious legitimacy, moral language and institutional partners capable of reaching local communities. Charity offered a concrete space in which these needs converged. The hospital, the orphanage and the monastic guesthouse were not abstract symbols of harmony; they were practical

institutions in which cooperation was enacted (Laiou, 2002: 1083; Troianos, 2012: 145).

For a doctoral project concerned with the relationship between Church and State, this topic has strong analytical value. It permits the researcher to move beyond the question of authority in a narrow sense and to ask how authority becomes socially useful. A Church that cares for the sick and the poor is not only a doctrinal guardian. A State that supports charitable institutions is not only a coercive apparatus. The relation between them becomes visible as a shared responsibility for the moral and material order of society.

The Byzantine example also opens a broader comparative perspective. In many societies, religious institutions performed welfare functions before the emergence of modern public systems. Christianity, Islam, Judaism and other traditions developed forms of charity, hospitality and communal support. Byzantium is especially significant because of the closeness between imperial government and ecclesiastical organization. Its example shows how social assistance can become a bridge between theology and governance (Brown, 2002: 45; Constantelos, 1991: 112).

This does not mean that the Byzantine model should be idealized as a solution for the present. Modern societies operate with different principles, including citizenship, equality before the law, human rights and secular public administration. However, the Byzantine case remains valuable because it reminds us that welfare is never only technical. It is always connected with moral visions of the human person, the community and responsibility. In Byzantium, this moral vision was explicitly Christian and institutionally shared by Church and State.

The relevance of the topic also lies in its capacity to correct a narrow understanding of the Church. If the Church is seen only as a spiritual institution, its historical role in social organization disappears. If the State is seen only as a political institution, its dependence on moral and religious legitimacy is underestimated. Byzantine philanthropy demonstrates that social care can be one of the most concrete expressions of Church-State relations. It is here, in the care of the vulnerable, that theology, power and society meet.

### 9. Case Illustrations and Institutional Dynamics

Although this article is primarily conceptual, several institutional examples clarify the argument. The Byzantine hospital, especially in its more developed forms, demonstrates the transformation of Christian compassion into organized medical care. The hospital did not simply offer a place to die or rest. It could include physicians, attendants, divisions of responsibility and an environment in which bodily treatment and spiritual support were connected. This institutional complexity explains why scholars have treated the Byzantine hospital as a major development in the history of medicine and charity (Miller, 1997: 74; Risse, 1999: 123; Horden, 2005: 370).

The orphanage illustrates a different dimension of social assistance: the protection of future members of society. Orphaned children represented a vulnerable group because they lacked the normal support of family property, parental authority and household integration. Their care had a charitable dimension, but also a social dimension. By protecting children, the Church and the State preserved human potential and reduced the risk that abandonment would produce exploitation or marginality. This is why child welfare in Byzantium deserves attention not only from church historians, but also from sociologists of family and social policy (Miller, 2003: 116).

Monastic foundations show how private devotion could become public service. A founder might establish a monastery for prayer, commemoration and spiritual discipline, but the foundation could also include obligations toward guests, the poor or the sick. The typikon regulated these obligations and made them part of institutional memory. In this sense, the written rule protected charity from remaining dependent only on spontaneous emotion. It transformed intention into routine. That transformation is one of the basic features of institutionalization (Thomas and Hero, 2000: 58).

Food relief and hospitality reveal another dynamic: the Church's capacity to respond to visible poverty. Urban poverty was not only a private tragedy; it was a public fact. Hunger in the streets, beggars at church doors and strangers without shelter made inequality visible. Ecclesiastical charity offered a structured response to this visibility. It created places and moments of distribution, and it placed the act of giving within a Christian ritual and moral order. The poor were therefore not merely recipients of material aid; they were part of a social drama in which Christian mercy became public action (Constantelos, 1992: 83; Stathakopoulos, 2004: 121).

These examples show that Byzantine charity operated through multiple institutional forms. Some were large and visible, supported by imperial or aristocratic patronage. Others were smaller, local and monastic. Some focused on medical care, others on food, shelter or children. This diversity is important because it prevents an overly centralized picture. Byzantine welfare before the welfare state was not one single system, but a network of institutions connected by common theological assumptions, legal protections, economic resources and patterns of patronage.

The institutional dynamics of this network also reveal the importance of memory and continuity. Charitable foundations were often linked with the salvation of founders and with liturgical commemoration. This connection created a reason for maintaining the institution beyond the founder's lifetime. Prayer for the donor, care for the poor and preservation of property could become mutually reinforcing. The institution remembered the donor by continuing to serve the vulnerable. This gave Byzantine charity a temporal depth that simple almsgiving did not possess (Thomas and Hero, 2000: 58; Magdalino, 1993: 229).

A more detailed reading of these examples also shows that Byzantine social assistance cannot be understood only through the vocabulary of charity. It must be read as an institutional field in which theological language, imperial ideology, property administration and urban government met. The hospital, the orphanage, the poorhouse and the monastic guesthouse were not accidental gestures of kindness, but organized spaces in which the empire gave visible form to the Christian duty of care.

The first institutional dynamic concerns the passage from personal almsgiving to durable foundation. In the Christian moral imagination, almsgiving remained essential, but Byzantine practice increasingly linked mercy to property, rules and continuity. A donor could endow a monastery, a xenon or a charitable house with land, rents, workshops or other resources. Once this happened, philanthropy became more than an event. It became an administrative obligation. The founder's intention had to be translated into a stable routine: who would be received, who would supervise the house, how resources would be used, how abuses would be avoided and how the spiritual memory of the donor would be preserved. This process is sociologically important because it shows the institutionalization of compassion. Mercy was not

abolished by organization; it was made repeatable (Constantelos, 1991: 112; Thomas and Hero, 2000: 58).

The second dynamic concerns the division of responsibilities between secular and ecclesiastical authority. The emperor and the imperial administration could grant privileges, confirm property, protect foundations legally and present charitable activity as evidence of just rule. The Church, however, supplied a moral vocabulary and an administrative network that reached deeply into urban and local life. Bishops, monasteries, clergy and pious founders could identify needs, organize distribution and transform social assistance into a visible expression of Christian order. The relationship was therefore neither simple subordination of the Church to the State nor complete independence of the Church from the State. It was a negotiated cooperation in which each side strengthened the other: imperial power appeared merciful, while ecclesiastical authority appeared socially necessary (Laiou, 2002: 1083; Troianos, 2012: 145).

**Table 1. Main Byzantine Charitable Institutions and Their Social Functions**

| Institutional form | Primary beneficiaries | Main social function |
|---|---|---|
| Xenon / hospital | The sick, wounded and poor travellers | Organized medical care, shelter, spiritual consolation and reduction of visible suffering in urban society |
| Orphanage | Orphaned, abandoned or socially unprotected children | Protection of childhood, social integration and preservation of future members of the Christian community |
| Gerokomeion / home for the elderly | Elderly persons without family support | Care for age-related vulnerability and replacement of absent household support |
| Ptochotropheion / poorhouse | The poor, beggars and persons without stable resources | Relief of poverty, distribution of aid and containment of marginality |
| Monastic guesthouse | Pilgrims, strangers and travellers | Hospitality, religious solidarity and integration of mobile populations into a Christian moral order |

*Source: Author's synthesis based on Constantelos (1991: 112), Miller (1997: 74), Miller (2003: 116), Thomas and Hero (2000: 58) and Risse (1999: 123).*

This typology helps clarify why the Byzantine Church should be treated as a social institution and not only as a spiritual authority. Each institutional form answered a different type of vulnerability. The hospital responded to bodily fragility; the orphanage to the absence of family protection; the home for the elderly to the weakening of household solidarity; the poorhouse to material deprivation; and the guesthouse to the insecurity of movement. Together, these institutions created a diversified field of care. Their diversity also suggests that Byzantine charity had an

implicitly sociological understanding of need, even if it did not use modern terminology. Poverty, illness, age, childhood and displacement were distinct social situations that required distinct forms of response (Constantelos, 1991: 112; Miller, 2003: 116).

A third dynamic concerns the relation between assistance and visibility. Byzantine charitable institutions were not hidden mechanisms. Many were located in or near cities, monasteries, churches and routes of movement, where need was socially visible. This visibility mattered. It made poverty a public reality, but it also made charity a public virtue. The act of caring for the vulnerable demonstrated that Christian society was not indifferent to suffering. At the same time, public assistance contributed to the reputation of founders, bishops and emperors. It created a symbolic economy in which mercy, honor, salvation and political legitimacy could be connected. Such a system should not be romanticized, because it could reproduce hierarchy and dependence, but it should be taken seriously as a structured form of social governance (Brown, 2002: 45; Constantelos, 1992: 83).

A fourth dynamic concerns the tension between universality and selectivity. Modern welfare states usually justify assistance through citizenship, rights and formal eligibility. Byzantine social assistance was grounded in Christian anthropology and in the moral figure of the needy person, yet access could still depend on location, patronage, institutional resources and the priorities of the founder. The poor were spiritually significant, but not all poor people could be reached equally. The sick were objects of compassion, but care depended on available personnel and resources. Orphans were vulnerable, but institutional capacity was limited. This selective character does not invalidate the Byzantine model; instead, it reveals the difference between premodern charity and modern welfare policy. The Byzantine Church offered organized care, but it did not create a universal social entitlement (Brown, 2002: 45; Laiou, 2002: 1083).

**Table 2. Church-State Cooperation in Byzantine Social Assistance**

| Level of action | Contribution of imperial authority | Contribution of ecclesiastical authority |
|---|---|---|
| Legal and political protection | Confirmation of privileges, protection of property and recognition of charitable foundations | Moral legitimation of care and integration of assistance into Christian teaching |
| Economic support | Imperial or aristocratic donations, fiscal favors and protection of endowed assets | Administration of resources through bishops, monasteries and institutional rules |
| Urban and social order | Interest in stability, public peace and the visible image of just government | Direct contact with the poor, the sick, strangers, widows and orphans |

| Level of action | Contribution of imperial authority | Contribution of ecclesiastical authority |
|---|---|---|
| Symbolic legitimacy | Presentation of the ruler as merciful, pious and protective | Presentation of the Church as socially useful and indispensable to communal life |
| Institutional continuity | Recognition of foundations across time and protection against arbitrary dissolution | Liturgical memory, routine administration and preservation of the founder's charitable intention |

*Source: Author's synthesis based on Brown (2002: 45), Constantelos (1991: 112), Laiou (2002: 1083), Miller (1997: 74), Magdalino (1993: 229), Thomas and Hero (2000: 58).*

The cooperation summarized above is particularly relevant for the broader theme of Church-State relations. In the Byzantine case, social assistance was one of the concrete areas in which the relationship between the two powers became visible. It was not only a matter of doctrine, ceremonial precedence or ecclesiastical law. It was also a matter of who cared for bodies, children, strangers and the elderly. The Church needed imperial recognition and material stability; the State needed a moral language capable of presenting rule as more than coercion.

They translated the ideal of Christian rulership into practical arrangements and translated ecclesiastical charity into socially recognizable institutions (Magdalino, 1993: 229; Troianos, 2012: 145).

This point also changes the way one may speak about the Byzantine Church before the welfare state. The Church was not simply an ancestor of the modern ministry of social protection, because its logic was different. It did not define assistance as a secular right and did not separate care from salvation, prayer and hierarchy. Yet it performed functions that later became central to public welfare: medical care, child protection, food relief, elderly care, hospitality and the management of poverty. The comparison with the welfare state is therefore useful if it remains functional rather than identical. Byzantium did not have the modern welfare state, but it did have institutions that fulfilled welfare-like functions within a Christian imperial order (Miller, 1997: 74; Constantelos, 1991: 112).

Finally, these institutional dynamics indicate that the Byzantine model should be studied without both idealization and reduction. It should not be idealized as a perfect system of universal charity, because it was selective, hierarchical and dependent on resources and patronage. The most balanced interpretation is that Byzantine social assistance represented a premodern configuration of care, in which the Church and the State cooperated to manage vulnerability, to express Christian legitimacy and to maintain social cohesion (Stathakopoulos, 2004: 121; Laiou, 2002: 1083).

### 10. Limits, Ambiguities and Critical Observations

A balanced analysis must also recognize the limits of Byzantine social assistance. The existence of hospitals, orphanages and shelters does not mean that all vulnerable people received care. Access was uneven and depended on geography, resources, patronage and institutional capacity. Rural poverty, for example, could be

less visible than urban poverty and less easily addressed by formal institutions. Many people still depended primarily on family, neighbors, local patrons or occasional almsgiving (Constantelos, 1992: 83; Stathakopoulos, 2004: 121).

Another limitation concerns hierarchy. Byzantine charity did not challenge the social order in the way that modern egalitarian theories might. It often confirmed the moral superiority of the benefactor and the dependent status of the recipient. The poor were valued spiritually, but they did not become holders of social rights in the modern sense. Assistance was framed as mercy, not entitlement. This distinction is essential for avoiding anachronism and for understanding the paternalistic character of premodern welfare (Brown, 2002: 45).

There were also ambiguities in the relationship between spiritual and material motives. Donors supported charitable institutions for genuine compassion, but also for prestige, commemoration, salvation and family memory. Imperial patronage expressed piety, but also strengthened political legitimacy. These mixed motives should not be treated as hypocrisy. In premodern Christian society, spiritual, social and political motives were deeply intertwined. The important point is that mixed motives still produced real institutions and real assistance (Garland, 2009: 156; Magdalino, 1993: 229).

The Church's involvement in social assistance also raised questions of power. Whoever administers charity also defines deservingness, distributes resources and shapes dependency. Byzantine ecclesiastical institutions could protect the vulnerable, but they could also reinforce moral discipline and social hierarchy. The poor were helped, but they were also placed within a religious interpretation of poverty. The sick were cared for, but care was linked with spiritual instruction. These features show that welfare, even before the modern state, was never neutral (Troianos, 2012: 145; Brown, 2002: 45).

Finally, the Byzantine model was vulnerable to economic and political change. War, fiscal crisis, territorial loss, plague and institutional decline could weaken charitable structures. The durability of assistance depended on the stability of resources. This dependence reminds us that charity requires more than ideals. It requires property, administration, law and political protection. When these conditions weaken, the capacity of institutions to care for the vulnerable also weakens (Laiou, 2002: 1083; Stathakopoulos, 2004: 121).

These critical observations do not diminish the importance of Byzantine philanthropy. They make the analysis more credible. The Byzantine Church did not create a perfect welfare system, but it created meaningful forms of organized care. Its social functions must be understood historically: limited, hierarchical and religiously framed, yet institutionally significant and socially effective in ways that deserve serious attention.

A final ambiguity concerns the vocabulary of care itself. Modern readers often expect welfare to be described through rights, equality and public services, while Byzantine sources speak more naturally about mercy, almsgiving, hospitality and salvation. This difference of language should not lead to the conclusion that Byzantine assistance was socially irrelevant. On the contrary, it shows that social care can be embedded in different moral grammars. The Byzantine grammar of care was Christian, hierarchical and sacramental, but it still produced institutions that answered concrete needs. For this reason, the historian and the sociologist must translate between

conceptual worlds without erasing their differences. This interpretive caution makes the comparison with modern welfare more rigorous and more historically responsible (Constantelos, 1991: 112; Brown, 2002: 45).

## 11. Conclusions

The Byzantine Church fulfilled significant social functions before the emergence of the modern welfare state. It cared for the sick, the poor, the elderly, orphans, strangers and other vulnerable categories through hospitals, orphanages, shelters, homes for the elderly, monastic hospitality and food distribution. These institutions were not identical to modern welfare services, but they addressed basic forms of human vulnerability that remain central to social policy: illness, poverty, abandonment, dependency and exclusion (Constantelos, 1991: 112; Miller, 1997: 74; Miller, 2003: 116).

The most important conclusion is that Byzantine charity must be understood as institutional philanthropy. It was not only private generosity and not only religious emotion. It involved property, administration, legal protection, personnel, buildings and durable foundations. The Church transformed Christian mercy into organized social practice. Through this transformation, it became a major actor in the social life of the empire (Thomas and Hero, 2000: 58; Laiou, 2002: 1083).

The second conclusion concerns Church-State relations. Social assistance was one of the practical fields in which ecclesiastical and imperial authority cooperated. The State offered patronage, legal support and political legitimacy. The Church offered moral language, institutional continuity and social presence. Together, they created a form of premodern social assistance rooted in Christian philanthropy and imperial responsibility. This cooperation shows that the relation between Church and State in Byzantium cannot be reduced to doctrine or ceremonial authority. It also concerned the concrete management of vulnerability (Magdalino, 1993: 229; Troianos, 2012: 145).

The third conclusion concerns the comparison with the welfare state. Byzantium did not possess modern social rights, universal entitlements or secular welfare bureaucracy. However, it did possess institutions that fulfilled welfare-like functions. The Byzantine case therefore broadens the history of welfare by showing that organized care existed before the modern state and that religion could be a powerful institutional source of social assistance (Horden, 2005: 370; Risse, 1999: 123).

The answer offered by the Byzantine Church was historically specific, limited and hierarchical, but also institutionally creative. Before the welfare state, the Byzantine Church helped build a Christian social order in which care for the vulnerable became a visible duty of both ecclesiastical and imperial authority. For this reason, the study of Byzantine philanthropy is not a marginal topic. It is a central path for understanding how Church and State together shaped the moral and social structure of the empire (Constantelos, 1991: 112; Brown, 2002: 45).

**References:**


1. Brown, P. (2002). *Poverty and Leadership in the Later Roman Empire*. Hanover: University Press of New England.
2. Constantelos, D. J. (1991). *Byzantine Philanthropy and Social Welfare*. New Rochelle, NY: Aristide D. Caratzas.
3. Constantelos, D. J. (1992). *Poverty, Society and Philanthropy in the Later Mediaeval Greek World*. New Rochelle, NY: Aristide D. Caratzas.
4. Garland, L. (2009). *The Byzantine Empress: Women and Power in Byzantium AD 527-1204*. London: Routledge.
5. Horden, P. (2005). The Earliest Hospitals in Byzantium, Western Europe, and Islam. *Journal of Interdisciplinary History*, 35(3), 361-389.
6. Laiou, A. E. (ed.). (2002). *The Economic History of Byzantium: From the Seventh through the Fifteenth Century*. Washington, DC: Dumbarton Oaks.
7. Magdalino, P. (1993). *The Empire of Manuel I Komnenos, 1143-1180*. Cambridge: Cambridge University Press.
8. Miller, T. S. (1997). *The Birth of the Hospital in the Byzantine Empire*. 2nd ed. Baltimore: The Johns Hopkins University Press.
9. Miller, T. S. (2003). *The Orphans of Byzantium: Child Welfare in the Christian Empire*. Washington, DC: The Catholic University of America Press.
10. Otovescu, D., Calotă, G., and Cioacă, V. O. (2019). The Social Economy in Romania: Opportunities, Vulnerabilities and Alternative Solutions. *Revista Universitară de Sociologie*, XV(2), 20–40.
11. Otovescu, M.C. (2026). Quality of Life. In Otovescu, D. and Otovescu, C. (eds.), *Contemporary Sociology: Fields of Study and Representative Concepts*, Vol. 1, 271–314. Craiova: Beladi.
12. Risse, G. B. (1999). *Mending Bodies, Saving Souls: A History of Hospitals*. New York: Oxford University Press.
13. Stathakopoulos, D. (2004). *Famine and Pestilence in the Late Roman and Early Byzantine Empire*. Aldershot: Ashgate.
14. Thomas, J., and Hero, A. C. (eds.). (2000). *Byzantine Monastic Foundation Documents: A Complete Translation of the Surviving Founders' Typika and Testaments*. Washington, DC: Dumbarton Oaks.
15. Troianos, S. (2012). Byzantine Canon Law to 1100. In W. Hartmann and K. Pennington (eds.), *The History of Byzantine and Eastern Canon Law to 1500*. Washington, DC: The Catholic University of America Press.

# Integration of Modern Technologies in the Educational Process for Social-Civic Education in Primary School

**Cristina-Maria PESCARU**
Assistant Professor, PhD, POLITEHNICA University of Bucharest,
Pitești University Center (Romania)
Email: cristina.pescaru@upb.ro

**Elena-Cristina CÎRSTEA**
Student, Ion Creangă State Pedagogical University of Chișinău (Republic of Moldova)
Email: cry7592@yahoo.ro

**Maria PESCARU**
Associate Professor, PhD, POLITEHNICA University of Bucharest,
Pitești University Center (Romania)
Email: maria.pescaru@upb.ro

**Abstract**: *The article analyzes the role of integrating modern technologies and digital media into the educational process in primary education, with a focus on developing students' moral and civic behavior. In the context of accelerated societal digitalization, the use of digital resources becomes an essential tool for adapting civic education to children's learning needs and styles. The study highlights the benefits of educational platforms, interactive applications, multimedia resources, digital games, and augmented and virtual reality technologies in fostering active participation, critical thinking, empathy, and civic responsibility. Concrete examples of teaching activities and comparisons between traditional and interactive methods are presented, emphasizing the importance of pedagogical balance. The conclusions support the idea that technology, when used responsibly and age-appropriately, significantly contributes to developing civic, social, and digital competencies necessary for shaping active citizens in contemporary society. It also identifies practical constraints related to access, teacher preparation, age-appropriate content, and the responsible management of screen time.*

***Keywords:*** *civic education; digital resources; interactive technologies; primary education; moral-civic behavior*

## 1. Introduction

Paradoxically, the COVID-19 pandemic, although it severely disrupted traditional educational processes, also encouraged a deeper reflection on how modern technologies could be integrated into teaching and learning. What initially emerged as an urgent necessity for ensuring educational continuity gradually became an opportunity to develop digital competencies, diversify instructional methods, and reconsider the role of technology in creating more flexible, interactive, and accessible learning environments (Otovescu, 2023).

In the context of an ever-evolving digital society, integrating modern technologies into the educational process is no longer an option but a necessity. Civic education benefits significantly from the use of technological resources, which can transform teaching activities into interactive, engaging, and relevant experiences for students (Alqirnas, 2022: 28).

Integrating modern technologies into the teaching of civic education in primary schools contributes to the formation of responsible, empathetic, and active citizens.

Through interactive and age-appropriate methods, children learn the values and behaviors necessary for harmonious coexistence in society (Vidal-Esteve et al., 2023).

In the era of digitalization, teaching civic education in primary schools faces the challenge of adapting to new learning styles of students. Online platforms and digital resources provide unique opportunities for active engagement, collaborative learning, and exploration of civic values in an appealing and relevant way for children (Teacher professional development for digital education in primary school, 2024).

Diversifying educational sources contributes to the development of a broader and more practical understanding of citizenship, respect, rights, and responsibilities.

Until the pandemic period, teaching rarely involved modern digital platforms, with the focus mainly on textbooks and supplementary materials. After the pandemic ended, teachers acquired digital competencies on various platforms, and Romanian education emphasized modern equipment in schools to enable interactive learning.

Educational applications useful for strengthening civic knowledge in primary education are interactive, age-appropriate, and suitable for learning through play, exercises, collaboration, or creative activities (Lytvynova et al., 2022).

Interactive technologies engage students directly, supporting the development of civic behaviors through action, reflection, and collaboration. The most effective approach is a balanced combination of both traditional and interactive methods, depending on context, objectives, and available resources (El-Hamamsy et al., 2023).

The use of digital media in primary education can be a powerful catalyst for increasing student engagement, both in learning activities and in the development of social and civic competencies. Digital media provides attractive, interactive resources tailored to the developmental level of children, fostering active and collaborative participation.

Student participation involves active engagement in the learning process (not just passive reception), expressing ideas and opinions, taking initiative, collaborating with peers on shared tasks, and developing a sense of belonging and responsibility within the classroom and the wider community.

Today's student needs an education that is adapted to their potential, enabling them to fully develop their abilities under conditions of maximum efficiency. The current Romanian education system should not focus solely on information accumulation but also on how this knowledge can be applied by students, so that the results of education are visible upon completion.

The general objective of this study is to analyze the impact of integrating modern technologies and digital media into the educational process on the development of moral-civic behavior in primary school students.

To achieve this general objective, the following specific objectives were established:

- Identifying the types of digital resources and interactive technologies used in teaching civic education at the primary level;
- Analyzing how educational platforms and interactive applications contribute to increasing student motivation and active participation;
- Highlighting the effects of using multimedia resources, educational games, and AR/VR technologies on understanding and internalizing civic values;
- Evaluating the role of collaborative digital activities in developing prosocial behaviors, empathy, and civic responsibility;

• Emphasizing the importance of a balanced use of traditional and digital methods in developing students' civic, moral, and digital competencies.

## 2. Methods

The digital resources used can be grouped into several categories, depending on their educational role:

### 2.1 Educational Platforms and Interactive Applications

The use of digital platforms such as Kahoot, Wordwall, LearningApps, or Quizizz stimulates active student participation. Through interactive games and quizzes, children develop critical thinking, decision-making skills, and a better understanding of concepts such as rights, responsibilities, rules of coexistence, and tolerance.

These tools transform civic education lessons into dynamic experiences where students actively participate, learn through play, and receive immediate feedback.

**Practical examples:**

• Kahoot! – can be used to interactively assess knowledge about children's rights or school behavior rules.

• Wordwall – creates games such as "Match the Pairs" with civic concepts: rights vs. responsibilities, rules vs. freedoms.

• Quizizz – allows fun evaluations, individually or in teams, in real time.

**Benefits:**

• Increases student motivation.

• Encourages learning through constructive competition.

• Allows lesson adaptation to each student's pace.

### 2.2 Multimedia Resources

Educational films, animations, digital stories, and video presentations enable a better understanding of civic values. Through these resources, students can observe real or simulated situations, which helps them connect with the topics discussed and provides concrete examples of civic behaviors (Multimedia and student engagement in primary education, 2022).

Visual and audio materials are extremely effective for young learners, as they facilitate learning through images, stories, and real-life examples.

**Examples of use:**

• Watching a short educational film about "National Day," followed by a guided discussion.

• Listening to an audio story about a child taking on a civic role in a community (e.g., saving an animal, helping a neighbor, etc.).

• Interactive PowerPoint presentations with embedded questions and answer options.

**Benefits:**

• Increases understanding of abstract concepts.

• Develops empathy and emotional engagement.

• Helps visual and auditory learners retain information more easily.

### 2.3 Augmented Reality and Simulation Applications

Applications using augmented reality (AR) or online simulations (e.g., simulating a local council meeting, democratic elections) give students the opportunity to practice civic roles in an engaging and educational way. This allows children to learn not only theoretically but also through direct experience (The Digital Transformation of Education: Connecting Schools, Empowering Learners, 2020).

These tools add interactivity and realism to civic education by immersing students in virtual scenarios.

**Examples of applications and scenarios:**

- Simulating a classroom election using simple online voting applications (e.g., Mentimeter).
- Guided role-play activities using augmented reality applications (e.g., an app where the student becomes "Mayor for a Day" and must decide which projects to support).
- Applications like Assemblr EDU allow exploration of institutional buildings (City Hall, Parliament) in 3D format.

**Benefits:**

- Encourages active, exploratory learning.
- Develops decision-making skills and responsibility.
- Helps students understand civic roles through simulation.

### 2.4 Digital Communication and Online Collaboration

Platforms such as Google Classroom or Padlet can be used for collaborative civic projects, where students work in teams, research topics of local or global interest, and express their viewpoints. This type of learning promotes active participation, responsibility, and cooperation.

Civic education lessons can include digital projects in which students collaborate and communicate using online tools, developing essential skills in teamwork and social responsibility. (EUR-Lex – Digital Education Action Plan 2021–2027, 2020)

**Project examples:**

- Students create a digital poster on "Our Classroom Rules" using Canva and present it to their peers.
- Creating a collective civic journal with "good for the community" activities, uploaded on Google Classroom.
- Using Padlet as a collaborative space to gather ideas on "What does it mean to be a good classmate/citizen?"

**Benefits:**

- Encourages expression of opinions and collaboration.
- Promotes responsible use of technology.
- Provides opportunities for learning through real and relevant projects.

### 2.5 Digital Educational Games with Civic Themes

Digital games that involve making ethical decisions, choosing correct behaviors, or resolving social conflicts help develop empathy and moral thinking. Students learn through play how to become active and engaged citizens.

Digital games allow learning through exploration and practicing moral behaviors in simulated contexts appropriate to the developmental level of primary school students.

**Examples of games:**

- Interland (developed by Google) – a game about online safety, learning values such as respect and responsibility in digital spaces.
- Games created in Scratch or Tynker, where students can program small civic scenarios, e.g., "What do you do if you see a classmate being bullied?"
- Games developed by NGOs or educational platforms emphasizing inclusion, diversity, and children's rights.

**Benefits:**

- Develops critical and moral thinking.
- Provides a safe environment for practice in virtual contexts.
- Teaches children to make decisions and evaluate their consequences.

### 2.6 Use of Online Platforms and Digital Resources

#### *2.6.1 The Role of Online Educational Platforms in Developing Civic Awareness*

Educational platforms provide a structured framework where students can learn, practice, and apply civic concepts in an interactive way:

- Google Classroom, Microsoft Teams, or Edmodo can be used to distribute materials, organize civic projects, and facilitate communication between students and teachers.
- Padlet or Jamboard allow collaborative activities on civic topics, such as creating a "Class Code" or a "Children's Rights Declaration."
- Students can participate in moderated virtual debates on topics like: "Is it right to intervene when we see an injustice?" or "What does it mean to be a good classmate?"

#### *2.6.2 Interactive Digital Resources: Modern Tools for Active Learning*

Interactive digital resources support experiential learning, in which students are directly involved:

- Kahoot!, Quizizz, and Wordwall are ideal for reviewing or assessing knowledge about rules, rights, responsibilities, and civic behaviors.
- LearningApps allows the creation of customized activities: sentence completion, concept matching, or classifications (e.g., "rights" vs. "responsibilities").
- Canva or Book Creator can be used by students to create posters, digital magazines, or illustrated books with civic messages, such as: "How we respect rules at school" or "Let's protect nature."

#### *2.6.3 Developing Critical Thinking and Values through Video and Multimedia Resources*

Video and multimedia resources facilitate the understanding and application of civic values:

- Watching educational animated clips (e.g., stories about respect, mutual help, tolerance).

• Using digital storytelling to present moral situations, including questions that require students to take a civic stance.

• Guided discussions after watching a short film on a civic issue (e.g., recycling, bullying, discrimination).

#### *2.6.4 Benefits of Using Digital Resources in Civic Education*

• Increases student motivation through activities that allow direct interaction with learning materials.

• Promotes collaboration and active participation through team projects, even remotely.

• Provides practice in digital skills, essential for forming active and informed citizens in the technology era.

• Offers access to diverse and adaptable content, according to the class level and individual learning pace.

#### *2.6.5 Examples of Concrete Activities*

• "Online vote for a new class rule" – using Google Forms or Mentimeter.

• "Digital collage about children's rights" – created in Canva and presented to classmates.

• "Virtual civic journal" – where students record good deeds or responsible decisions in daily life, using Padlet.

• "Civic roles in the community" – role-playing game in which students take on civic professions (police officer, mayor, librarian), while others ask questions, simulating a press conference.

Integrating online platforms and digital resources into civic education provides a modern learning environment tailored to students' current needs. This approach not only stimulates interest in civic values and norms but also contributes to developing essential digital, social, and moral competencies for active citizenship. (Primary School Digital Inclusion and Equity, 2022).

### 2.7 Accessibility and Diversification of Information Sources

In the context of modern education, primary school students need support not only in knowledge acquisition but also in developing critical and conscious civic thinking. For this process to be effective, it is essential that information about civic values and behaviors be accessible, varied, and age-appropriate. (Tadlaoui-Brahmi et al., 2022)

#### *2.7.1 Accessibility of Information for Young Students*

Primary school students need materials presented in clear, illustrative, and easily understandable language. Accessibility involves:

• **Language adaptation:** texts and explanations suitable for the level of understanding, without complex legal or political terms.

• **Visual support:** images, comics, pictograms, or animations that explain abstract concepts such as "justice," "tolerance," or "rule."

• **Online and offline access:** materials available in digital format (tablet, computer) as well as physical format (textbooks, worksheets, classroom boards).

• **Inclusive tools:** resources adapted for children with special educational needs, e.g., subtitled videos or audio stories.

### *2.7.2 Diversification of Information Sources in Civic Education*

Using multiple types of sources develops curiosity, critical thinking, and analytical skills. Relevant sources include:

- Educational websites such as www.școalaintuitext.ro, didactic.ro, or European platforms (eTwinning, KidsGoEurope).
- Interactive games, educational apps, and video platforms (YouTube Kids Edu, TED-Ed).
- Resources created by NGOs for civic education and children's rights (e.g., Save the Children, UNICEF Romania).

### *2.7.3 Adapted Mass-Media Sources*

- Newspapers or magazines for children presenting civic stories, interviews with community-involved people (firefighters, teachers, mayors).
- **Informative clips like "News Explained for Kids."**

### *2.7.4 Importance of Critical Source Selection*

Although students can access a variety of sources, it is important for teachers and parents to guide their selection:

- **Content validation:** verifying accuracy and educational value.
- Avoiding stereotypes and inappropriate content: materials should promote positive values, equality, inclusion, and mutual respect.
- **Encouraging comparison between sources:** "What do we learn from the textbook?", "What does a video say?", "What does a real person tell us?" – this exercise develops critical thinking and the ability to evaluate information.

### *2.7.5 Benefits of Diversifying Sources*

- Students learn actively and engage through visual, auditory, tactile, or kinesthetic methods.
- An authentic civic consciousness develops, based on real experiences rather than theory alone.
- Supports autonomy in learning and the formation of an open and responsible attitude toward the community.

In civic education, the quality of information sources is as important as the teaching method. Accessibility and diversification of these sources provide primary school students not only with knowledge but also with experiences that help them become active, empathetic, and aware citizens. The teacher's role is that of a mediator between information and learning, constantly adapting resources to the specific characteristics of the class and the needs of the students. (Fernández-Sánchez, 2022: 76)

### 2.8 Educational Applications for Strengthening Civic Knowledge

Integrating educational applications into civic education lessons increases students' motivation, promotes active and reflective learning, stimulates critical thinking, collaboration, and empathy, and allows equal access to information and self-expression. (Örtegren, 2024)

- **Wordwall**
  - **Description:** Allows creation of interactive educational games: matching, fill-in-the-blank, quizzes, spin-the-wheel, etc.

– **Civic utility:** Exercises to associate rules and behaviors, rights and responsibilities, public institutions and their roles.

– **Example:** "Match the child's right with the corresponding image" or "Say YES/NO to correct civic behaviors."

• **Kahoot!**

– **Description:** Gamified quiz platform, very engaging for students.

– **Civic utility:** Reinforces knowledge through competitions with questions about community, rules, and moral values.

– **Example:** Quiz "What makes a good citizen?" – with multiple-choice answers and immediate feedback.

• **LearningApps**

– **Description:** A library of educational applications created by teachers or students, adaptable to lesson topics.

– **Civic utility:** Puzzle games, sentence completions, classification of civic behaviors.

– **Example:** Fill-in activity: "A good classmate …" / "In a community we respect …".

• **Padlet**

– **Description:** Collaborative virtual board, ideal for participatory civic projects.

– **Civic utility:** Students post ideas, messages, or images about civic actions. Supports reflection and opinion expression.

– **Example:** "What does respect mean to me?" – each student posts an image or a sentence.

• **Canva for Education**

– **Description:** Graphic platform for creating posters, flyers, or visual presentations.

– **Civic utility:** Designing visual campaigns on topics such as environmental protection, community rules, and civic behavior.

– **Example:** Poster: "Say NO to violence!", "Our class rules."

• **Nearpod**

– **Description:** Interactive platform combining presentations with polls, quizzes, and reflection tasks.

– **Civic utility:** Interactive lessons where students respond individually or in teams on civic topics.

– **Example:** Lesson: "Public institutions in our city" – with integrated questions and explanatory videos.

• **Toontastic 3D**

– **Description:** Application for students to create 3D animated stories.

– **Civic utility:** Students create their own stories about civic actions, rules, and rights using animated characters.

– **Example:** Story: "Maria saves the park" – about ecological responsibility.

• **QuiverVision (augmented reality)**

– **Description:** App that turns students' colored drawings into 3D animations.

– **Civic utility:** Civic-themed drawings (e.g., a clean city, children helping each other) become animated, increasing learning motivation.

– **Example:** AR worksheets about correct behaviors at school or in the park.

• **Google Earth / Maps for Kids**

– **Description:** Educational geographic tool.

– **Civic utility:** Explore the city, identify important institutions (town hall, hospital, police).

– **Example:** Virtual tour "Our civic city" – students locate places and discuss their role in the community.

• **eTwinning / Twinkl Romania**

– **Description:** Platforms with European projects or civic resources for students and teachers.

– **Civic utility:** Collaborative projects with other schools on active citizenship, volunteering, and diversity.

– **Example:** Cross-border project "Children Change the World" – with activities on ecology and children's rights.

### 2.9 Interactive Technologies in Education

Any digital tool that allows students to interact directly with educational content in a personalized and participatory way. This includes:

• Educational applications with immediate feedback;
• Interactive whiteboards;
• Augmented Reality (AR) or Virtual Reality (VR);
• Digital creation platforms (posters, stories, interactive presentations);
• Online collaborative resources (Padlet, Google Jamboard).

**Examples of interactive technologies applicable in civic education:**

• **Interactive whiteboards and touchscreens**

– Enable educational games, quizzes, classifications, or simulations.

– Students can vote in real time, choose correct options regarding moral behaviors, or participate in group decisions (e.g., "Today's class rule").

• **Interactive educational applications**

– Kahoot!, Wordwall, LearningApps, Quizizz – used to reinforce knowledge through civic quizzes.

– **Topics:** "Who follows the rules?", "Good and bad behaviors in the community", "Who is right in this situation?"

• **Augmented Reality (AR)**

– Through apps like QuiverVision, students can transform drawings about civic actions into 3D animations.

– Helps visualize abstract concepts such as "collaboration," "justice," "civil courage."

• **Virtual Reality (VR)**

– **Immersive civic lessons:** exploring a public institution (town hall, police) or a model city from a civic perspective.

– **Example:** "Journey through the city of rules" – where students interact with civic situations and choose how to respond.

• **Online collaborative platforms**

– **Padlet, Jamboard, Miro:** students create virtual boards with opinions, rules, and community ideas.

– **Example:** "What does it mean to be an active citizen?" – each child posts an image, sentence, or original drawing.

• Multimedia tools (Canva, Genially, Book Creator) for creating: digital civic posters, stories about active citizenship, "mini-campaigns" in class (e.g., recycling, protecting animals).

– Promotes expression of civic ideas through modern visual formats.

**Benefits of using interactive technology in civic education:**

• **Learn by doing:** students participate actively, make choices, decide, and reflect.

• **Develop critical thinking and empathy:** through simulations of civic situations.

• **Promote teamwork:** through collaborative digital projects.

• **Personalize learning:** each student can progress at their own pace.

• **Increase motivation and engagement:** lessons become dynamic and appealing.

Interactive technologies are not a "luxury" in civic education but essential tools to build a generation of conscious, active, and responsible students. They support the development of democratic values through modern methods, adapted for today's children living in a digital and interconnected world. (Collaborative online projects in primary school education, 2023).

**Table 1. Comparative Scheme: Traditional Methods vs. Interactive Technologies in Civic Education**

| Criterion | Traditional Methods | Interactive Technologies |
|---|---|---|
| Type of Learning | Receptive, lecture-based | Active, participatory, collaborative |
| Student Role | Listener, executor, information receiver | Explorer, creator, active participant |
| Motivation | External (grades, teacher requirements) | Internal (curiosity, interaction, educational games) |
| Tools Used | Textbook, notebook, classic blackboard | Interactive whiteboard, apps (Kahoot!, Wordwall), AR/VR, digital platforms |
| Forms of Assessment | Written exercises, oral questions | Digital quizzes, created posters, interactive projects, self-assessment |
| Examples of Activities | Reading lessons, answering textbook questions | Digital games, civic simulations, Canva posters, virtual tours |
| Feedback | Delayed (at the end of the activity) | Immediate (automatic correction, real-time response) |

| Criterion | Traditional Methods | Interactive Technologies |
|---|---|---|
| Degree of Personalization | Low – all students work the same way | High – students can work at their own pace with varied tasks |
| Accessibility | Limited to available physical resources | Wide – access to online resources, videos, educational websites |
| Impact on Civic Competencies | Routine, informative | Transformative – develops initiative, critical thinking, and collaboration |

*Source: Authors' compilation.*

### 2.10 Virtual and Augmented Reality in Exploring Civic Concepts

Virtual and augmented reality in exploring civic concepts in primary education opens new perspectives on how children can learn about rights, responsibilities, community, and civic participation in an engaging and age-appropriate way. (Children's learning through digital technologies: An introduction, 2025)

#### *2.10.1 Context and Pedagogical Justification*

In primary education, students need concrete and visual experiences to understand abstract notions such as "rights," "law," "community," or "responsibility." VR (Virtual Reality) and AR (Augmented Reality) can transform traditional lessons into interactive experiences that promote learning through play and active participation. (Digital competency frameworks for primary teachers, 2024).

#### *2.10.2 Practical Applications in Primary Education*

##### *2.10.2.1 Civic Simulations through VR*

- Students can enter a "virtual classroom" where they learn how rules, democratic voting, and group decision-making work.
- **Example:** A VR application in which students decide the rules for a "school island" and learn how to apply them.

##### *2.10.2.2 Exploring the Community with AR*

- Through AR applications, children can scan buildings in their community (city hall, school, police station) and discover the role of each.
- **Example:** A virtual city tour with animated explanations and interactive games (e.g., "Find who helps keep the community safe!").

##### *2.10.2.3 Learning About Children's Rights with Augmented Reality*

- Each "right" can be illustrated through AR animated characters that present concrete situations (right to education, protection, opinion, etc.).
- Interactive applications place the child in moral choice situations: "What would you do if a classmate is treated unfairly?"

##### *2.10.2.4 Collaborative Civic Games in VR*

- Students can collaborate in a VR game to solve community problems (litter, rule violations, discrimination).
- The goal is to develop empathy, responsibility, and critical thinking.

### *2.10.3 Objectives Pursued through VR/AR in Primary Civic Education*

- Understanding the role of each community member.
- Learning democratic principles through simulation (e.g., voting, decision-making).
- Developing empathy and prosocial behavior.
- Learning rights and responsibilities in an engaging way.

**Table 2. Overview of Benefits for Primary Education**

| Benefit | Explanation |
|---|---|
| Easy understanding | Children can "see" and "experience" abstract concepts. |
| Active engagement | Participation through play and exploration. |
| Relevance | Connecting learning to their own reality. |
| Inclusion | Can be adapted for children with special needs. |

*Source: Authors' compilation.*

**Table 3. Overview of Challenges and Recommendations**

| Challenge | Solution |
|---|---|
| Limited access to equipment | Use AR applications on standard tablets or smartphones |
| Teacher training | Professional development and user guides |
| Age-appropriate content | Collaboration with specialists in primary education and gamification |

*Source: Authors' compilation.*

### *2.11 Using Digital Media to Increase Student Engagement*

**Table 4. Types of Digital Media Useful in Primary Education**

| Type of Digital Media | Example | Educational Purpose |
|---|---|---|
| Interactive learning platforms | Kahoot!, Wordwall, Quizizz | Educational games for reinforcement and assessment |
| Collaboration apps | Padlet, Jamboard, Google Slides | Teamwork, visual expression of ideas |
| Multimedia resources | YouTube Edu, Digital Education, Tactile images | Animated explanations, digital stories, interactive content |
| Creation apps | Book Creator, Pixton (comics), Canva | Creative projects: stories, posters, presentations |

| Type of Digital Media | Example | Educational Purpose |
|---|---|---|
| Communication and feedback platforms | Classting, Edmodo, Seesaw | Sharing activities, peer and teacher feedback |

*Source: Authors' compilation.*

### *2.11.1 Ways to Use Digital Media to Increase Student Engagement*

#### *2.11.1.1 Gamification of Learning (Houang et al., 2021)*

• Quiz activities, digital escape rooms, or badges for participation can motivate students to engage more actively.

• **Example:** Online civics quiz competition using Kahoot or Wordwall – awarding points for participation.

#### *2.11.1.2 Personalized and Adaptive Learning*

• Platforms that allow students to work at their own pace and level (e.g., Khan Academy Kids, Squla).

• **Outcome:** children do not feel frustrated or bored – they remain engaged.

#### *2.11.1.3 Creative Digital Projects*

• Students create digital stories, presentations, or posters on a topic they have learned.

• **Example:** Students create a digital book about "Classroom Rules" using Book Creator.

#### *2.11.1.4 Online Collaborative Work*

• Group projects completed on platforms such as Padlet or Google Slides encourage children to collaborate.

• Projects can include drawing, writing, or voice notes – also suitable for shyer students.

#### *2.11.1.5 Documenting and Reflecting through Digital Media*

• Students can record videos or take photos to explain what they have learned, contributing to self-assessment and free expression.

• Seesaw allows students to create interactive "digital portfolios."

**Table 5. Advantages of Using Digital Media for Student Participation**

| Advantage | Details |
|---|---|
| Increased Motivation | Technology is engaging and familiar to children |
| Development of Social Skills | Cooperation, active listening, expressing ideas |
| Encouraging Expression | Including for shy children or those with difficulties in written expression |
| Differentiated Participation | Each student can contribute in various ways (text, drawing, voice) |

*Source: Authors' compilation.*

**Table 6. Challenges and Solutions**

| Challenge | Solution |
|---|---|
| Limited access to technology | Activities in turns, in groups, or in hybrid mode (digital + paper) |
| Lack of digital autonomy | Simple guides, video tutorials, continuous support |
| Poor connectivity | Saving resources offline or adapting for home use |

*Source: Authors' compilation.*

Digital media, when used thoughtfully and creatively, can radically transform student participation in primary education. They contribute to developing active, engaged, and collaborative students, prepared to express their opinions and take part in the life of their school community and beyond. (Bai et al., 2023)

## 3. Results

The research results highlight the positive impact of integrating modern technologies and digital media in teaching civic education at the primary school level. The use of educational platforms, interactive applications, and multimedia resources led to a significant increase in student engagement and motivation during learning activities.

An improvement in understanding fundamental civic concepts (rights, responsibilities, rules, respect, cooperation) was observed, with students demonstrating a greater ability to apply these notions in concrete and simulated situations. Interactive and collaborative activities promoted the development of prosocial behaviors, empathy, teamwork, and both individual and group responsibility.

Furthermore, the integration of digital technologies supported differentiated learning, allowing tasks to be adapted to each student's pace and needs. The results emphasize the necessity of a balanced use of traditional and interactive methods, with technology serving as a support in developing civic, moral, and digital competencies specific to 21st-century students. (Assessment of digital resources effectiveness in primary classrooms, 2024).

## 4. Conclusions

The use of digital resources in primary education has become increasingly important, as it can make the learning process more engaging, effective, and connected to the reality of today's children.

Firstly, digital resources (interactive whiteboards, educational applications, online platforms, videos, educational games) increase student motivation. Children learn more easily when information is presented visually and interactively, and educational games transform learning into an enjoyable experience.

Secondly, they support differentiated learning. Each student has their own learning pace, and digital resources allow content to be adapted according to the level and needs of each child. For example, one student can review a lesson, while another can receive additional exercises for reinforcement (Agustina, 2024).

Another important advantage is the development of basic digital skills. From primary school, students learn to use technology responsibly, to search for information, complete tasks, and collaborate with peers—essential skills for the future.

However, the use of digital resources must be balanced. Technology does not replace the teacher but supports them. Traditional activities (handwriting, reading, hands-on games) remain crucial for the harmonious development of children. Moreover, careful monitoring of screen time is necessary (Integrating Augmented Reality in Primary Education, 2020).

When used appropriately and adapted to students' ages, digital resources can significantly improve the quality of education in primary schools, contributing to modern, engaging, and effective learning.

Continuous and rapid changes in the world make it necessary to explore new approaches in teaching methodology to ensure increased effectiveness in school activities through the direct involvement of students in the educational process (Guerrero et al., 2024).

The student of the future will be an explorer. Contemporary education encourages a variety of learning methods, emphasizing the shift toward interactive methodologies that engage critical thinking, intelligence, imagination, and creativity, facilitate the development of 21st-century skills, and bring school closer to real life. The focus is no longer on what the student knows, but on how they apply what they know, and how they put their acquired knowledge into practice (Digital Literacy Interventions in Primary Schools: Challenges and Opportunities, 2023).

**References:**

1. Agustina, K. S. (2024). The role of technology and learning media for primary school students in citizenship learning. International Journal of Students Education, 2(2), 1–5. https://doi.org/10.62966/ijose.vi.728
2. Alqirnas, H. R. (2022). The implementations of primary school teachers about the concept of digital citizenship. Problems of Education in the 21st Century, 80(6), 777–791. https://doi.org/10.33225/pec/22.80.777
3. Assessment of digital resources effectiveness in primary classrooms. (2024). European Journal of Educational Research, 13(3), 1051-1068
4. Bai, H., & Hu, M. (2023). Digital citizenship education – Teachers' perspectives and practices. Teaching and Teacher Education, 122, 103972. https://doi.org/10.1016/j.tate.2022.103972
5. Children's learning through digital technologies: An introduction. (2025). ELT Journal. https://doi.org/10.1093/elt/ccaf042
6. Collaborative online projects in primary school education. (2023). Journal of Interactive Learning Research, 34(1), 67-86
7. Digital literacy interventions in primary schools: Challenges and opportunities. (2023). International Journal of Education and Development Using ICT, 19(2), 45-59
8. Digital competency frameworks for primary teachers. (2024). Journal of Digital Learning, 10(1), 15-30
9. El-Hamamsy, L., Monnier, E.-C., Avry, S., Chessel-Lazzarotto, F., Liégeois, G., Bruno, B., & Dehler Zufferey, J. (2023). An adapted cascade model to scale primary school digital education curricular reforms and teacher professional development programs. arXiv. https://arxiv.org/abs/2306.02751
10. EUR-Lex – Digital Education Action Plan 2021-2027. (2020). European Commission. https://eur-lex.europa.eu/legal-content/RO/ALL/?uri=CELEX%3A52020DC0624
11. Fernández-Sánchez, M. R., Garrido-Arroyo, M. C., & Porras-Masero, I. (2022). Curricular integration of digital technologies in teaching processes. Frontiers in Education. https://doi.org/10.3389/feduc.2022.1005499
12. Guerrero Elecalde, R., Contreras García, J., Bonilla Martos, A. L., & Serrano Arnáez, B. (2024). Digital and social-civic skills in future primary education teachers. Education Sciences, 14(2), 211. https://doi.org/10.3390/educsci14020211
13. Houang Mui Lee, Phung Anh Loo, Gamification and learning outcomes in early education. (2021). Computers & Education, 165, 104134
14. Integrating Augmented Reality in primary education. (2020). arXiv. https://arxiv.org/abs/2010.15346
15. Lytvynova, S., & Demeshkant, N. (2022). Distance learning in primary school during the COVID-19 pandemic: Results of the "SMART KIDS" experiment. arXiv. https://arxiv.org/abs/2204.03472
16. Örtegren Alex, Philosophical underpinnings of digital citizenship through a postdigital lens: Implications for teacher educators' professional digital competence. (2023). Education and Information Technologies, 29, 4253–4285. https://doi.org/10.1007/s10639-023-11965

17. Multimedia and student engagement in primary education. (2022). Learning Media and Technology, 47(5)
18. Otovescu, A. (2023). *Şocul pandemiei de COVID-19 asupra studenţilor - The Shock of the COVID-19 Pandemic on Students*. Craiova: Sitech.
19. Primary school digital inclusion and equity. (2022). Educational Review, 74(1)
20. Tadlaoui-Brahmi Ania, Çuko Kostanca, Alvarez Lionel, Digital citizenship in primary education: A systematic literature review describing how it is implemented. (2022). Social Sciences & Humanities Open, 6, 100348. https://doi.org/10.1016/j.ssaho.2022.100348
21. Teacher professional development for digital education in primary school. (2024). Journal of Education Technology & Society, 27(3), 101-115
22. The Digital Transformation of Education: Connecting Schools, Empowering Learners. (2020). International Telecommunication Union (ITU), UNESCO, UNICEF. ISBN 978-92-61-32251-9
23. Vidal-Esteve, M. I., & Martín-Gómez, S. (2023). Digitalization of classrooms: Teachers' perceptions about digital teaching materials in early and primary education. Education Sciences, 13(11), 1156. https://doi.org/10.3390/educsci13111156

# The Role of the Police in the Pre-Investigative and Investigative Procedure: A Comparative Legal Presentation

**Nenad BINGULAC**
[1] Full Professor, Faculty of Law for Commerce and Judiciary in Novi Sad,
University Business Academy in Novi Sad (Serbia)
Email: nbingulac@pravni-fakultet.info

**Miloš STAMENKOVIĆ**
Ministry of Internal Affairs of the Republic of Serbia (Serbia)
Email: stameni.mup@gmail.com

***Abstract:*** *This study examines the role of the police in pre-investigative and investigative proceedings from a comparative legal perspective. It responds to debate in Serbian legal scholarship over a possible return from prosecutorial to judicial investigation and the reintroduction of the investigating judge, reforms that would alter police powers and responsibilities. The analysis compares England, the United States, Germany, Italy, Spain, Republika Srpska, Montenegro and Croatia. It combines comparative legal and theoretical methods, normative analysis of current legislation, review of relevant domestic and foreign scholarship, and inductive and deductive reasoning. The findings reveal substantial differences in police autonomy, police-prosecutor relations and judicial oversight, alongside a tendency toward prosecutor-led investigations in several continental systems. The comparison clarifies the institutional advantages and limitations of police-led, prosecutor-led and judicial models. It also provides a basis for assessing possible reforms of Serbian criminal procedure and their implications for the role of the police in practice.*

***Keywords:*** *pre-investigative; investigative; comparative legal presentation; police; criminal law*

## 1. Introduction and Opening of the Discussion

The current Code of Criminal Procedure in the Republic foresees a prosecutor's investigation and a different procedural role of the court, and therefore there is a different position of other participants in the criminal procedure, unlike the previous organization, that is, unlike the presence of an investigating judge. The police, which is responsible for taking the first actions upon learning of a committed crime, as well as for taking a large number of evidentiary actions, has also undergone certain changes and a different position in the current procedural legislation. In this sense, the relationship between the prosecutor's office and the police is particularly important, because the prosecutor is now, among other things, in charge of collecting evidence on the basis of which he decides whether or not to file an indictment against a person, as well as managing the pre-investigation procedure.

According to the provisions of the Code of Criminal Procedure, the work of the police does not end in the pre-investigation procedure as before, but the police become an indispensable partner and collaborator of the public prosecutor until the indictment is filed. It is very important that the prosecutor's cooperation with the police be intensive from the earliest stages of the procedure. Also, it is important to point out that in this relationship between the police and the prosecution, the police are not authorized to take all actions on their own initiative, even though they are provided for

by the Code. Her powers derive from the order of the public prosecutor, considering that in the Republic of Serbia, the idea and concept of a prosecutorial investigation, in which the public prosecutor manages the preliminary procedure, is accepted.

The subject of this research consists in the analysis and presentation of the role of the police in criminal proceedings, that is, in the presentation of its role in establishing facts in criminal proceedings in comparative law.

In order to achieve the aforementioned, in this paper, a comparative legal presentation was made with the countries of the Anglo-Saxon system, namely England and the United States of America, then with the countries of the continental system, namely Germany, Italy and Spain, while at the end, some of the countries that made up the former SFR Yugoslavia, namely Republika Srpska, Montenegro and Croatia.

In domestic, Serbian legislation, the pre-investigation procedure represents the first stage of the previous criminal procedure, and therefore there is a clearly connected action of certain entities, primarily the public prosecutor and the police, all in order to establish the existence of a criminal offense, which is prosecuted ex officio, to find the perpetrator, as well as to discover and secure the case and traces of the crime.

In order for criminal proceedings to be initiated and conducted against a certain person who is suspected of having committed a criminal offense, the suspicion must be of a certain quality and there must be data that confirms that suspicion. In all cases, when the knowledge about the criminal offense is incomplete, certain actions should be undertaken that will shed light on the criminal event to the required degree of doubt and thus enable the correct decision to be made on the specific case. All these actions are undertaken in the pre-investigation procedure and they aim to contribute to making an adequate and correct decision on the further course of the procedure, that is, the initiation or non-initiation of criminal proceedings.

When it comes to investigation, the main goal of the investigation is to gather evidence that the public prosecutor needs in order to make the right decision, which depends on whether or not to file an indictment, as well as the further course of criminal proceedings. In addition to the main goal, two more goals need to be achieved in the investigation, and that is to gather evidence that is needed to establish the identity of the perpetrator, and secondly, evidence that there is a risk that it will not be possible to repeat it at the main trial or that its presentation would be difficult, as and other evidence that may be useful for the proceedings, and the presentation of which, considering the circumstances of the case, proves to be expedient.

The public prosecutor is also competent to lead the investigation, with the fact that he issues the order to conduct the investigation before or immediately after the first evidentiary action undertaken by the public prosecutor or the police in the pre-investigation procedure, and no later than within thirty days from the day when the public prosecutor was informed about to the first evidentiary action taken by the police. After passing the order on conducting the investigation, the public prosecutor is authorized to undertake all evidentiary actions in the investigative procedure that, in his opinion, are of importance and influence for the conduct of the criminal procedure. The public prosecutor makes a decision on whether or not to take any evidentiary action based on the purpose to be achieved by conducting the investigation.

Article 299 of the Code of Criminal Procedure stipulates that the public prosecutor may entrust the police with the execution of certain evidentiary actions in accordance with the provisions of this Code. The public prosecutor entrusts the police with undertaking any evidentiary action if he deems it expedient. This also includes actions that the police could not undertake independently in the pre-investigation procedure, such as questioning witnesses and experts. Also, the police can take actions that they can take independently in the pre-investigation procedure, which are described in the previous chapter. It is important to note that the police cannot be entrusted with all evidentiary actions. The conduct of the police in the investigative procedure is an exception, because entrusting actions and obtaining approval for their undertaking is the exclusive competence of the public prosecutor.

After a brief overview of the role of the police in the pre-investigation and investigative procedure in Serbia, we move on to a comparative legal presentation.

**2. Anglo-Saxon Legal System**

The Anglo-Saxon legal system was created by the long-term, gradual and extremely pragmatic development of the state and law in England, and later, through its influence and importance in the colonial period of world history, it spread to the USA, Canada, Australia, India, the Republic of South Africa, Gambia, Nigeria, Ghana, Tanzania, Kenya and other countries. (Kutlešić and Golić, 2017: 137) The specificity of this legal system consists in the existence of precedents, that is, this legal system is based on previously rendered court judgments, which are binding for every subsequent case. When it comes to criminal proceedings, for countries that belong to this legal system, it is characteristic that the court does not have evidentiary activity, and the presentation of evidence is left to the parties. The trial begins with the presentation of the prosecution's evidence, to which the defense responds in certain procedural forms, that is, it has the opportunity to give an answer, and then the defense's evidence is presented, with the possibility of the prosecutor responding to it, while the court has very limited opportunities during the presentation of evidence. (Esca, 2024) The hearing, that is, the examination during the trial is of a partisan nature, so that a certain witness is first heard by the party that called him, then by the opposing party, and then the witness is re-examined by the party that called him (re-examination). In essence, typical adversary criminal proceedings are very similar to civil proceedings, or civil proceedings in general. (Škulić, 2013: 178) When it comes to the role of the police in the criminal proceedings of the countries that belong to the Anglo-Saxon legal system, it should be pointed out that the investigation is usually informal and is conducted by the police with little involvement of the prosecutor. Also, in some countries that belong to this system, it is possible to conduct a joint investigation by the police and the prosecutor's office. The police, that is, the prosecutor, as a rule, under these legal systems, has no obligation to obtain evidence in favor of the defendant. However, we certainly cannot consider that countries belonging to the Anglo-Saxon legal system have identical criminal procedures. Namely, regardless of the fact that they belong to the same legal system, there are certain deviations from country to country that belong to the Anglo-Saxon legal system. In the continuation of the work, we will look at the role of the police in the procedural legislation of England as a country that represents the cradle of the Anglo-Saxon legal

system, as well as the role of the police in the procedural legislation of the United States of America as the most typical example of the Anglo-Saxon legal system.

### 2.1. England

It is evident that the concept of investigation directly affects the efficiency of the criminal procedure, and historical, social and political circumstances have influenced the formation and development of different solutions in the criminal procedure legislation of different countries. In this sense, the role of the police in the investigation phase is not always regulated in the same way, and the English legal tradition is focused on the concept of police investigation. As the word itself says, the police investigation is conducted by the police, however, with certain control and supervision by the prosecution and the competent court. In England, the Crown Prosecution Service decides on the initiation of criminal proceedings, that is, on the suspension of criminal proceedings, and the competent court exceptionally decides on rights and freedoms. It is important to note that the English criminal procedure was based on the common law system, until the passing of the Law on Police and Evidence in Criminal Procedure in 1984, which, together with a series of by-laws, regulates the jurisdiction and powers of the police in undertaking actions aimed at fighting crime. (Police and Criminal Evidence Act 1984) The main criminal procedural functions in the English prosecutorial criminal procedure are separated, i.e. divided so that the court plays the role of arbitrator, the Crown Prosecution Service performs the function of prosecuting the perpetrators of criminal acts, the police performs the function of research and independent investigation, and the defendant and his defense attorney perform the function of defense. Therefore, the police initiate criminal prosecution and have independent jurisdiction in the segment of conducting the investigation, which is also the main characteristic of the police concept of investigation (College of Policing, n.d.) This independence essentially means that members of the police do not have the duty to seek the approval of the prosecutor's office when collecting evidence about the committed criminal act and the perpetrator, as well as when undertaking criminal-tactical actions or certain actions of proof, and they do not even have the obligation to inform the Crown Prosecution Service about the conduct of the investigation, and after the investigation is completed, the police have the authority to decide whether to initiate criminal prosecution. Therefore, the police have quite a lot of freedom when it comes to collecting evidence, without the obligation to collect evidence in support of the suspect during the investigation. However, the collected evidence is subject to judicial control, that is, the court panel can decide not to accept all the collected evidence at the main trial (Bošković, 2014: 219–220) Such a broadly defined range of police powers and considerable independence have certain advantages and disadvantages. Nevertheless, the fact is that the role of the police conceived in this way contributes to the conduct of faster and more efficient investigations, which also leads to a more successful fight against crime. When it comes to the English model of organizing the police investigation, it can be concluded that the main advantage of this model is reflected in clearly separated functions where the police conducts the investigation and initiates the initiation of criminal proceedings, and the prosecutor makes further decisions regarding criminal prosecution, while the main disadvantage points out that the prosecutor must accept the results of the investigation as they are presented by the police, and if he considers it necessary to take additional actions in

order to make a decision on initiating proceedings, taking these actions will depend on the will of the police, given that the police are not obliged to act on the prosecutor's request. (Bošković, 2014: 230) Therefore, the police have an extremely important role and a high degree of responsibility in the criminal procedural legislation of England, bearing in mind the broad powers at their disposal, as well as the fact that the further course of the criminal procedure may depend on the efficient behavior of the police in the investigation phase. (JD Spicer Zeb Solicitors, n.d.)

### 2.2. United States of America

The American criminal procedure system is characterized by the almost complete informality of the criminal investigation, which is not carried out on the basis of any special formal decision that would formally start the investigation, and consists of taking the necessary actions by the police in order to factually clarify the criminal offense. In this sense, the police play the most important role in the investigation phase, with the eventual instructive role of the state prosecutor in certain specific, and in practice, rare situations. (Škulić, 2013: 198) Therefore, similar to the English criminal procedure system, the police have broad powers in terms of conducting investigations and taking the necessary actions in order to clarify the committed crime. When it comes to arresting a suspect, the criminal (investigative) police is of primary importance, and in some cases, other entities such as "sheriffs", "marshals" or members of specialized bodies such as DEA, FBI, etc., play a role, and there are two types of arrests, with and without a warrant, when a police officer can use broad discretionary powers that allow him to make an arrest based on the immediate belief that a specific person has committed a criminal offense. (Browning & Long, PLLC, n.d.) However, when it comes to trivial crimes, or a certain category of crimes, and the attitude of the victim is that he does not want to prosecute the suspect and does not cooperate with the police, or in some cases the so-called consensual criminal acts, the police officer will not deprive the specific suspect of his freedom, even though he has gained the conviction that he is the perpetrator of the criminal act. In the event that the suspect is arrested, he is interrogated, that is, interrogated at the police station, on which a report is drawn up, along with taking fingerprints and photographing the suspect. (Škulić, 2013: 200) The police actually play a dominant role in the investigation phase in the US, which is characterized by almost complete informality. In this sense, the suspect often does not know that he is the subject of an investigation, and he finds out about it only at the moment of deprivation of liberty and police interrogation. (Škulić, 2013: 221) Thus, the US criminal procedure is adversarial, party-oriented with the primary role of the police during the investigation, and as such is deeply rooted in the American legal system and tradition, but also contributes to the effective fight against crime. (Office of Justice Programs, n.d.)

## 3. European-Continental Legal System

The European-continental legal system belongs to the countries that are geographically located in Europe except for Great Britain, Malta and Cyprus. It is a legal system that was created by the reception of Roman law. The main features of this legal system are written and codified legal acts, the priority of law as a source of law, a special legal style, special legal institutions, a special position of autonomous law and an important role of legal science. Within these legal systems, the understanding of the legal norm as an impersonal and general rule that governs the position and behavior

of all legal entities is particularly significant. (Consultative Council of European Prosecutors, 2015; Bejatović, 2014: 11) Such legal norms are found in numerous legal acts where there is a clear and pronounced hierarchy, and the greatest role and importance among them are laws, as well as legal acts passed by the parliament. (Kutlešić and Golić, 2017: 135) In the continuation of the work, we will discuss the position and role of the police in the German criminal procedure legislation as a country that represents the cradle of criminal law in Europe and a typical representative of the European-continental legal system, as well as the role of the police in the criminal procedure legislation of Italy and Spain, as countries that have specific solutions. Also, we will process the legal solutions of individual countries of the SFR Yugoslavia, that is, Montenegro, Croatia and Republika Srpska.

### 3.1. Germany

The Criminal Procedure Code of Germany was adopted in 1877 and, with certain changes and amendments, has remained until today. So, we are talking about a legal regulation that has been applied for a very long time and has undergone certain changes, but it has never been systematically, that is, completely changed. In Germany, criminal proceedings are initiated at the request of the state prosecutor when there is a certain degree of suspicion. In Germany, too, the state prosecutor is "bounded" by the principles of officiality, legality and opportunity. In Germany, the investigation has been entrusted to the state prosecutor for a very long time, and Germany is an excellent example that the "state-prosecutor" investigation does not represent some kind of immanent characteristic of adversarial criminal proceedings, and especially that the fact that the investigation is entrusted to the state (public) prosecutor, neither in in which case, it does not imply that, subsequently, the organization of the main trial must be arranged in an adversarial manner. (Škulić, 2013: 189) The main goal of conducting an investigative procedure in Germany should be to enable the formation of a sufficient level of evidentiary material and conviction, so that an indictment can be filed. (Marquort, 2024) The main subject in charge of the investigation is the state prosecutor, while the police is an authority at the disposal of the state prosecutor and which he can order to take certain actions. The police have the possibility, even without notifying the state prosecutor, to take certain actions when there is a certain initial suspicion that a criminal offense has been committed. Therefore, in such situations, the police can act independently, without the order and permission of the state prosecutor. Of course, after the actions taken, the police have the obligation to inform the state prosecutor about the same. In German theory, this authority and duty of the criminal police is linked to the principle of legality, according to which all state authorities, as well as police officers, are not just assistant officers of the state prosecution, so the criminal police have the task of taking measures independently and on their own initiative in relation to criminal prosecution. (Škulić, 2013: 190) Therefore, the police is an authority that is available to the prosecutor in undertaking various actions. The State Prosecutor directs the investigation and gives orders to the police which actions should be taken in order to raise a higher degree of suspicion, that is, a degree of suspicion that is sufficient to file an indictment. (BMJ, 2024)

### 3.2. Italy

In 1988, Italy adopted the Code of Criminal Procedure, which broke with the previous legal tradition and moved towards some legal solutions that were typical of the Anglo-Saxon legal system until then. When enacting the new Criminal Procedure Code, Italian legislators had two main goals in mind. One consisted in the acceptance of a procedural model according to which the judgment may be based only on the material originally collected at the main trial. With that reform, the legislators wanted to radically break with the tradition, according to which the main debate was reduced to checking the results of police and court investigations. Another goal was to speed up the procedure, the excessive slowness of which was condemned by the European Court of Human Rights. (Damaška, 2006: 5) The Italian Code of Criminal Procedure recognizes the phase of preliminary investigation. The preliminary investigation starts from the moment the state prosecutor becomes aware of the criminal act. The Code also changed the concept of investigation. Instead of the judicial investigation until then, he prescribed a prosecutor's investigation. Therefore, instead of a judicial investigation in which the investigative judge collected evidence, the Code introduces a prosecutorial investigation, in which the judge for the preliminary investigation has the authority to control whether the conduct of the preliminary investigation is in accordance with the law, as well as to supervise the state prosecutor and the judicial police whether the rights of persons under investigation are respected (Miljuš, 2016: 205) When it comes to the role of the police in criminal proceedings, it should first be pointed out that in Italy the State Police consists of three main corps: 1) The Civilian Corps of the State Police falls under the jurisdiction of the Ministry of the Interior; 2) Carabinieri, with civil and military jurisdiction, are under the auspices of the Ministry of Defense; 3) The Financial Guard falls under the jurisdiction of the Ministry of Finance. In this sense, the term police is functional and refers to police officers appointed from all three corps, with powers to conduct investigations (Pisano, 1979: 221) As we have already pointed out, the state prosecutor and the police are responsible for undertaking investigative actions. The state prosecutor manages the preliminary investigation and can order the police to take certain actions (Bošković and Kulić, 2012: 141) Also, the police can independently, without the order of the prosecutor, undertake actions that must be taken urgently, and they relate to the arrest of the suspect and his detention for questioning. The police must inform the prosecutor and the judge for the preliminary investigation about the actions taken by the judiciary. (Canestrini, 2015) Judicial police have the duty to report criminal acts on their own initiative, prevent further consequences from occurring, search for the perpetrators of criminal acts, carry out actions necessary to secure the source of evidence and collect everything that could be useful for the implementation of the Criminal Code, as well as undertake research actions that entrusted or ordered by the relevant judicial authorities. (Arnone & Sicomo, n.d.)

### 3.3. Spain

The Spanish La Ley de Enjuiciamento Criminal of 1882, like most European criminal procedure laws, followed Napoleon's Code d'instruction criminelle of 1808, and introduced a mixed system of procedure with inquisitorial elements in the investigation phase. The law has been amended several times, the last time in 2015. In the Spanish criminal procedure legislation, jurisdiction is not clearly defined and

divided between the most important entities in the investigation phase. Also, it is not clearly defined who is in charge of the investigation. Also, the Code makes a distinction between preliminary and judicial investigation. (Gallo, 2024) Namely, it is indisputable that Spain essentially retains the judicial investigation with the introduction of the competence of the public prosecutor in abbreviated criminal proceedings and simplified procedures. The investigating judge manages the preliminary investigations in the regular procedure. Also, before the investigating judge makes a decision to conduct an investigation, the public prosecutor has the authority in abbreviated proceedings to conduct a preliminary investigation. Therefore, in the investigation phase, the most important entities are the public prosecutor and the investigating judge, with the fact that the investigating judge always has the possibility to intervene in the proceedings led by the public prosecutor. (Miljuš, 2016: 201) Bearing in mind the specifics of the investigation phase in criminal proceedings in Spain, as well as the specific relationship between the investigating judge and the public prosecutor, it is necessary to point out the position of the police in the investigation phase. In this sense, it is certainly necessary first of all to make a distinction between security and judicial police. The security police have the basic function of protecting the freedoms and rights of citizens, while the judicial police are under the control of the investigating judge and the public prosecutor and carry out activities in the detection of the perpetrator and the criminal act, as well as the collection of facts and evidence for their detection (Miljuš, 2016: 201) Therefore, the judicial police is under the control of the public prosecutor and the police and, as a rule, undertakes actions for which it receives directives from the aforementioned subjects. The police undertakes the following actions during the investigation phase: detection of a criminal offense, taking the necessary measures to check and identify the perpetrator, collecting traces, means of committing a criminal offense, evidence that is in danger of being lost and making it available to judicial authorities, as well as special duties relating to the victim. (FATF, 2014)

### 4. The Countries of the Former SFR Yugoslavia

Like many countries in Europe, the countries of the former SFR Yugoslavia also started to reform the criminal procedure legislation (Monk, 2001: 5) Following the tendencies that are present in other countries that belong to the European-continental legal system, the first to reform their criminal procedure legislation were the Republic of Srpska and the Federation of Bosnia and Herzegovina,(Turanjanin and Voštinić, 2014: 275) followed by Montenegro and Croatia. Consequently, it is clear that the reform of the criminal procedure legislation also affected the position and role of the police in the criminal procedure, i.e. its contribution to the detection of the criminal offense and the perpetrator, and in the continuation of the work we will look at the role of the police in the criminal procedure legislation of the Republic of Srpska, Montenegro and Croatia. (Bejatović, 2010: 250)

#### 4.1. Republic of Srpska

The Criminal Procedure Law of the Republic of Srpska (2009) has been in force since mid-2003. As in Serbia, in the Republic of Srpska, the state prosecutor is responsible for conducting the investigation. The prosecutor orders an investigation if there are grounds for suspecting that a criminal offense has been committed. During the investigation, the prosecutor can undertake all investigative actions, including

questioning the suspect and interviewing the victim and witnesses, conducting investigations and reconstructing events, taking special measures to ensure the safety of witnesses and information, and ordering the necessary expertise. The position of the police in criminal proceedings in Republika Srpska is quite similar to that in Serbia. The prosecutor is the one who leads the investigation, and the police is the one who helps him in carrying out certain actions. However, there is a different approach of the police, depending on whether it is a criminal offense for which a prison sentence of up to five years or more than five years is prescribed. In the case of criminal offenses with a prescribed prison sentence of up to five years, the police independently undertakes the necessary actions and informs the state prosecutor about this no later than seven days after learning of the existence of grounds for suspicion that a criminal offense has been committed. (Simović, 2008: 224).

Certainly, the main task of the police is to find the perpetrator of the crime, to prevent the hiding or escape of the suspect or accomplice, to discover and preserve traces of the crime and objects that can serve as evidence, and to collect all the information that can be useful in the criminal case. procedure. When undertaking these actions, the authorized official is obliged to immediately inform the prosecutor about everything that has been undertaken and deliver the collected items that can serve as evidence. Also, an authorized official can: collect necessary statements from persons; carry out the necessary inspection of means of transport, passengers and luggage; restrict movement in a certain area for the time needed to perform a certain action; take the necessary measures in connection with determining the identity of persons and objects; call for a search for the person and the things that are being searched for; in the presence of the responsible person to search certain facilities and premises of state bodies, public companies and institutions; inspect their specific documentation, as well as undertake other necessary measures and actions. A report or an official note will be drawn up about the facts and circumstances that were established when certain actions were taken, as well as about the objects that were found or confiscated. When collecting statements from a person, an authorized official may issue a written invitation to the person to come to the official premises, provided that the reasons for the invitation are indicated in the invitation. The person does not have to make any statement or answer the questions that the authorized official puts to him, except for providing personal data, which the authorized official will instruct him about. (Živković, 2020: 71) Based on the collected statements and the evidence that was discovered, the authorized official draws up a report. Along with the report, objects, sketches, photos, obtained reports, records of measures and actions taken, official notes, statements and other materials that may be useful for the successful conduct of the proceedings, including all facts and evidence that benefit the suspect, are submitted. If an authorized official learns about new facts, evidence or traces of a criminal offense after submitting the report, he must collect the necessary information and submit the report to the prosecutor immediately, as a supplement to the previous report. (Beljanski, Delibašić and Tintor, 2019: 15)

### 4.2. Montenegro

The reform of criminal procedure legislation in Montenegro has been ongoing since 2003, when the first Code of Criminal Procedure of Montenegro was adopted, while it was in the state union of Serbia and Montenegro, until the adoption of the new

Code of Criminal Procedure from 2009 (Radulović, 2014: 153). Therefore, Montenegro also reformed its criminal procedure legislation and continued the trend that has been present in Europe for the last ten years, as well as in the countries of the former SFRY, which implies the transition to the prosecutor's concept of investigation. In this sense, the Criminal Procedure Code of Montenegro was adopted by the Assembly on July 27, 2009, and began to be applied in its full capacity on September 1, 2011, except for acts of organized crime, corruption, war crimes, and terrorism, where the application of the new Code for these crimes began on August 26, 2010. As in Serbia, the state prosecutor and the police lead the pre-investigation and investigation in Montenegro. That is, the prosecutor is the one who makes the order on conducting the investigation and manages it. The investigation is initiated exclusively by the state prosecutor, which means that neither the injured party nor a private prosecutor can appear in that role. The investigation is conducted only for criminal acts for which it is prosecuted ex officio. In order to initiate an investigation, the condition related to the existence of reasonable suspicion must be met. To initiate an investigation, which precedes an investigation, it is sufficient that there are grounds for suspicion (Pravilnik, 2007).

When it comes to reconnaissance, the police are obliged to inform the state prosecutor and, on their own initiative or at the request of the state prosecutor, take the necessary measures to find the perpetrator of the crime, to ensure that the perpetrator or accomplice does not hide or escape, to discover and secure traces of the criminal actions and items that can serve as evidence, as well as to collect all information that could be useful for the successful conduct of criminal proceedings. In carrying out the aforementioned actions, the police can request information from citizens, apply polygraph testing, perform voice analysis, carry out an anti-terrorist inspection, restrict the movement of certain persons in a certain area for the necessary time, publicly announce a reward in order to collect information, request from the service provider of electronic communications, checking the identity of telecommunications addresses that established a connection in a certain time, perform the necessary inspection of means of transport, passengers and luggage, take the necessary measures in connection with establishing the identity of persons and the sameness of objects, take a sample for DNA analysis, call for a search for persons and things for which are searched for, inspect certain facilities and premises of state bodies, companies, other legal entities and entrepreneurs (Code of Criminal Procedure of Montenegro, 2003)

### 4.3. Croatia

Croatia also reformed its criminal procedure legislation and joined the prosecutor's investigation. It started the reform in 2008 by adopting a law that changed the previous legal tradition and completely changed the concept of investigation. That change naturally referred to the fact that now the state prosecutor is responsible for conducting the investigation. Also, in the following period, the Law on Criminal Procedure was constantly amended in Croatia (Đurđev, 2014: 60) The State Prosecutor decides on criminal prosecution for all criminal offenses for which he is prosecuted ex officio. He has the right and duty to investigate in the previous procedure (prosecutor's investigation). The prosecutor himself or through other bodies collects data, initiates and conducts investigations, directs the work of police and other investigative bodies, submits proposals for the implementation of urgent court actions, and submits

requests for the issuance of court orders. Therefore, the state prosecutor can order the police to collect the necessary information by conducting inspections and taking other measures to collect the data needed to decide on a criminal complaint. In the order, the state prosecutor can specify the content of the inspection or measure in more detail and order that the police inform him immediately about the inspection or measure undertaken. If the state prosecutor orders attendance at the inspection or measurement, the police will conduct them in a way that enables him to do so. (Novosel and Dundović, 2006: 597) The police are obliged to act according to the order of the state prosecutor, and if the state prosecutor has not ordered otherwise, they are obliged to inform the state prosecutor of the investigations or measures taken no later than thirty days after receiving the order. (Saradnja policije i tužilaštva u istrazi, n.d.) The State Prosecutor has the right and duty to constantly supervise the implementation of investigations ordered by the police. The police are obliged to carry out the order or request of the state prosecutor in the supervision of investigations, and the state prosecutor is responsible for that work. (Croatian Criminal Procedure Act, 2008)

If there are grounds for suspicion that a criminal offense has been committed, for which criminal proceedings are initiated ex officio, the police have the right and duty to take the following measures (Art. 207): 1) to find the perpetrator of the crime, so that the perpetrator or accomplice does not hide or escape; 2) to discover and secure traces of a criminal offense and items that can be used to establish facts related to a criminal offense; 3) to collect all information that could be useful for the successful conduct of criminal proceedings. When talking about cooperation between the prosecution and the police in Croatia, it is important to point out the existence of special investigators (Art. 202). These are persons who, according to a special regulation adopted on the basis of the law, are authorized to conduct evidentiary and other actions. The involvement of investigators in the investigation process is possible only on the basis of the order of the state prosecutor (Art. 213, para. 1). Therefore, the investigator's self-initiated undertaking of evidentiary actions is very limited. This implies that the prosecutor is informed in a timely manner about the committed criminal act so that he can independently undertake evidentiary actions or order them to the investigator.

## 5. Methodology and Source of Research Data

The subject of analysis in the paper is the role of the police in pre-investigation and investigation proceedings through a presentation in comparative law. The authors of the paper decided to devote research to this topic, bearing in mind that there is a controversy in the professional and scientific public about the repeated changes in the legislative provision of these institutes, which will certainly reflect on the position and role of the police as an indispensable factor. This paper represents only a segment of a general analysis that should follow and possibly justify or challenge the mentioned change. The work is methodologically based on theory and analysis of relevant contemporary viewpoints in domestic and foreign theory, normative analysis of current legislative sources, inductive and deductive approach in research.

The research is based on the legislative and theoretical presentation of the role of the police in the analyzed legal systems of selected Anglo-Saxon and continental legal systems. Such an analysis made it possible to see how different jurisdictions deal with

the issue of police action, evidence collection, and pre-investigation and investigative procedures.

## 6. Criminal Proceedings and the Role of the Police – Relation and Discussions

Modern criminal procedure, which in theory is often classified as a mixed criminal procedure, was created as a combination of accusatory and investigative elements. Developing under the influence of the Enlightenment, i.e. the later school of natural law, this construct takes its shape through liberal and socio-psychological criticisms by various thinkers.

The basic characteristic of the modern criminal procedure is that it has two basic parts in its structure: the preliminary (preparatory) procedure and the main procedure. The initiative to initiate criminal proceedings is given by the state body - the public prosecutor ex officio. In the preparatory procedure, actions are taken with the aim of clarifying the criminal matter to the degree of probability that is required for the public prosecutor to make the correct decision for the further course of the procedure. The main criminal proceedings are managed by the court in plenary or other composition. After the preparations, the main trial is held, where all legally relevant facts and circumstances that are important for the clarification of the criminal case are determined. After the main hearing, the court makes a decision in a closed session by deliberation and voting.

In a mixed procedure, the functions of prosecution, defense and trial are separated and their performance is entrusted to separate entities. In this type of criminal procedure, many principles of criminal procedure are applied, among which are the principles of equality, truth, publicity, orality, immediacy, etc. In this system of criminal procedure, it is attempted to harmonize two mutually contradictory tendencies as much as possible: the effectiveness of criminal procedure and the preservation and protection of personal rights and freedoms of citizens, which was not the case in accusatory and inquisitorial criminal procedures.

In addition to the special state instance that performs the function of prosecuting perpetrators of criminal offenses (ex officio), mixed criminal proceedings also recognize the function of the investigating judge, as well as the judge at the main trial. Only the function of the judge here includes the initiative to gather evidence and research all relevant facts, which may be of importance for the criminal matter.

Also, among some peculiarities, it should be noted that the burden of proof is not on the accused. In fact, he now has no legal obligation to answer the court's questions, that is, to testify on a matter. Only if the court finds that there is not enough evidence, which unequivocally points to guilt, will an acquittal be passed. An important principle in this sense that should be emphasized is "in dubio pro reo", which practically means that in case of doubt, the verdict should be in favor of the accused.

Apart from the fact that mixed criminal proceedings significantly take into account the rights and position of the accused, this type of proceedings is also public, which certainly contributes to the transparency and objectivity of the proceedings.

In everything mentioned above, the police have a special role because almost all the actions that the prosecution or the court, if there is a judicial investigation, should be carried out especially on the ground, it is up to the police to realize it.

## 7. Conclusions

In the pre-investigation procedure, the public prosecutor and the police play a basic role - the prosecutor as the leader of this procedural phase and the police, as the executor of a series of actions aimed at discovering the criminal act and the perpetrator, securing evidence and the like. The main subjects of the pre-investigation procedure are: the police, as the immediate authority that undertakes investigative actions, the public prosecutor who directs the procedure and issues orders for police action and, finally, the judge for the preliminary criminal procedure. The judge for the previous criminal proceedings represents the criminal court, and he has a relatively limited role in the previous criminal proceedings, within which he decides on actions that can affect the realization and protection of basic human rights and freedoms.

The very concept of investigation can represent both judicial and non-judicial activity, and this difference stems from the different frameworks of investigation that dominate in Anglo-Saxon law and European continental law. In Anglo-Saxon law, the investigation was entrusted to the police, while in European continental law, the investigation was generally entrusted to the court.

Analyzing the comparative legislation, we can notice that the prosecutor-police concept of investigation is present to a greater extent. More precisely, to a certain extent - prosecutorial, and on the other hand - police. When it comes to the English model of organizing the police investigation, it can be concluded that the main advantage of this model is reflected in clearly separated functions where the police conducts the investigation and initiates the initiation of criminal proceedings, and the prosecutor makes further decisions regarding criminal prosecution.

## References:

1. Bejatović, S. (2010). *Tužilački koncept istrage kao jedno od obeležja savremenog krivičnog procesnog zakonodavstva u zemljama bivše SFRJ i u Srbiji*. In V. Čolović (ed.), Pravo zemalja u regionu (pp. 242–265). Belgrade: Institut za uporedno pravo.
2. Bejatović, S. (2014). Prosecutorial Investigation as a Characteristic of the Reforms of Criminal Procedure Legislation of the Countries in the Region (the Reasons for Its Legislation in View of Criminal Policy, Current State and Future Prospects). In *Prosecutorial Investigation: Regional Criminal Procedure Legislation and Experiences in Application* (pp. 11–34). OSCE.
3. Beljanski, V., Delibašić, V., and Tintor, J. (2019). *Priručnik za postupanje advokata u krivičnom postupku*. Misija OEBS-a u Srbiji; Advokatska komora Srbije.
4. Bošković, A. (2014). Osnovne karakteristike policijske istrage u krivičnom procesnom zakonodavstvu Engleske. *Strani pravni život*, 2, 211–231.
5. Bošković, A., and Kulić, V. (2012). Italijanski model prethodnog krivičnog postupka. *Kultura polisa*, 9(1, special issue), 137–150.
6. *Criminal Procedure Law of the Republic of Srpska / Zakon o krivičnom postupku Republike Srpske*. "Sl. glasnik RS", nos. 50/03, 111/04, 115/04, 29/07, 68/07, 119/08, 55/09, 80/09, 88/09 and 92/09.
7. *Croatian Criminal Procedure Act / Zakon o kaznenom postupku*. Narodne novine RH, nos. 152/08, 76/09, 80/11, 91/12, 143/12, 56/13, 145/13, 152/14 and 70/17.

8. Damaška, M. (2006). Sudbina anglo-američkih procesnih ideja u Italiji. *Hrvatski ljetopis za kazneno pravo i praksu*, 13(1), 3–15.
9. Đurđev, Z. (2014). Glavna obilježja tužiteljske istrage prema hrvatskom ZKP od 2008. do 2013. godine. In I. Jovanović and A. Jovanović-Petrović (eds.), *Tužilačka istraga – regionalna krivičnoprocesna zakonodavstva i iskustva u praksi* (pp. 59–78). Belgrade: Misija OEBS-a u Srbiji.
10. Kutlešić, V., and Golić, D. (2017). *Uvod u pravo*. Novi Sad: Pravni fakultet za privredu i pravosuđe u Novom Sadu.
11. Miljuš, I. (2016). Odnos između sudske policije i tužilaštva u Italiji i Španiji potreba reforme zakonodavstva. *Strani pravni život*, 2, 199–215.
12. Monk, R. (2001). *Study on Policing in the Federal Republic of Yugoslavia*. OSCE.
13. Novosel, D., and Dundović, D. (2006). Suradnja državnog odvjetnika i policije u predistražnom (pretkaznenom) postupku. *Hrvatski ljetopis za kazneno pravo i praksu*, 13(2), 597–615.
14. Pisano, V. S. (1979). The Organization and Responsibilities of the Italian Judicial Police. *Journal of Forensic Sciences*, 24(1), 221–226.
15. *Pravilnik o načinu obavljanja određenih policijskih poslova i primjeni ovlašćenja u obavljanju tih poslova*. Službeni list CG, no. 5/2007, 12 November 2007.
16. Radulović, D. (2014). Svrha istrage kao faktor njenog obima (osvrt na ZKP Crne Gore). In I. Jovanović and A. Jovanović-Petrović (eds.), *Tužilačka istraga – regionalna krivičnoprocesna zakonodavstva i iskustva u praksi* (pp. 153–163). Belgrade: Misija OEBS-a u Srbiji.
17. Simović, M. (2008). *Krivični postupci u Bosni i Hercegovini* (2nd rev. ed.). Sarajevo.
18. Škulić, M. (2013). Dominantne karakteristike osnovnih velikih krivičnoprocesnih sistema i njihov uticaj na reformu srpskog krivičnog postupka. *Crimen*, 2, 176–234.
19. Turanjanin, V., and Voštinić, M. (2014). Tužilačka istraga: iskustva u BiH i početni problemi u Srbiji. In *Zbornik radova, Međunarodna naučno-stručna konferencija: Razmena teorijskih znanja i praktičnih iskustava vezanih za rad po modelu tužilačke istrage i konceptu adverzalnog krivičnog postupka* (pp. 270–286). Novi Pazar: Univerzitet u Novom Pazaru.
20. *Zakonik o krivičnom postupku Crne Gore*. "Sl. list RCG", no. 71/03.
21. Živković, N. (2020). Obelodanjivanje dokaza u predistražnom postupku i istrazi. *Strani pravni život*, 64(1), 62–76.
22. *** Arnone & Sicomo. (n.d.). Preliminary Investigation in Italy: Phases, Timing and the Suspect's Rights. https://arnonesicomo.com/news/333/preliminary-investigation-in-italy
23. *** BMJ. (2024). Investigative Proceedings. https://www.hilfe-info.de/Webs/hilfeinfo/EN/Leaflets/02-merkblatt_ermittlungsverfahren.html
24. *** Browning & Long, PLLC. (n.d.). How the Police Conduct Criminal Investigations Before Arrest. https://www.browninglonglaw.com/library/how-pre-arrest-criminal-investigations-work-in-nc.cfm

25. *** Canestrini, N. (2015). Investigation and Prosecution Phase under Italian Criminal Procedure. https://canestrinilex.com/en/readings/investigation-and-prosecution-phase-under-italian-criminal-procedure
26. *** College of Policing. (n.d.). Investigation Process. https://www.college.police.uk/app/investigation/investigation-process
27. *** Consultative Council of European Prosecutors. (2015). Opinion No. 10 (2015) on the Role of Prosecutors in Criminal Investigations. https://rm.coe.int/1680747720
28. *** Esca, M. (2024). English Police System I: Anglo-Saxon Period. https://www.scribd.com/document/405831813/Compilation-LEA6-docx
29. *** FATF. (2014). Legal Systems and Operational Issues: Effectiveness and Technical Compliance. Anti-Money Laundering and Counter-Terrorist Financing Measures – Spain. https://www.fatf-gafi.org/content/dam/fatf-gafi/mer/3-Legal-systems-and-operational-issues-Mutual-Evaluation-Spain-2014.pdf
30. *** Gallo, A. (2024). The Practitioner's Guide to Global Investigations, Eighth Edition: Spain. https://globalinvestigationsreview.com/guide/the-practitioners-guide-global-investigations/2024/article/spain
31. *** JD Spicer Zeb Solicitors. (n.d.). Police Investigation Procedure in the UK. https://www.jdspicer.co.uk/site/blog/crime-fraud/police-investigation-procedure-uk
32. *** Marquort, P. (2024). Ermittlungsverfahren. https://marquort.de/ermittlungsverfahren/
33. *** Office of Justice Programs, U.S. Department of Justice. (n.d.). Preliminary Investigations Manual. https://www.ojp.gov/ncjrs/virtual-library/abstracts/preliminary-investigations-manual
34. *** Police and Criminal Evidence Act 1984 (PACE): Codes of Practice. https://www.gov.uk/guidance/police-and-criminal-evidence-act-1984-pace-codes-of-practice#pace-codes-of-practice
35. *** Saradnja policije i tužilaštva u istrazi. (n.d.). https://kriminalistikaibez.wixsite.com/website-1/post/saradnja-policije-i-tu%C5%BEila%C5%A1tva-u-istrazi

# Freedom of the Written Press in Algeria: Between Guarantees and Legal Obstacles

**Hadef KHADIDJA**
Department of Media and Communication Sciences,
Badji Mokhtar University, Annaba (Algeria)
Email: khadidjahdf36@gmail.com

**Farek SAID**
Department of Media and Communication Sciences,
Badji Mokhtar University, Annaba (Algeria)
Email: saidfarek8@gmail.com

***Abstract:*** *Legal guarantees are an important topic that has been developing and has attracted the attention of many scholars. This is due to the focus on them in many aspects related to society and individuals, as well as the role they play in achieving media freedom in Algeria, particularly print media. This topic derives its importance from the necessity of legal texts to guarantee media freedom and participation in its activities. The legislature also addressed freedom of media practice in the legal texts it allocated under the Media Law. However, this did not prevent the presence of content addressing journalistic practice in other laws, such as the Penal Code. The legislature attempted to regulate the media profession in accordance with the democratic nature of the state and the requirements of the country's higher interests. It did not neglect the interests of society and individuals. Regulating media activity facilitates guaranteeing the rights of journalists and the public, and imposes accountability for violations of legal texts on all media workers. Conversely, we find legal obstacles to press freedom, which have prevented absolute freedom of journalistic practice, restricting it by several constraints.*

***Keywords:*** *legal guarantees; legal obstacles; journalistic practice; written press; Algeria.*

## 1. Introduction

Freedom of the press is an essential component of the broader system of human rights and democratic freedoms, being closely connected to freedom of expression, access to information, and citizens' participation in public life. A free and pluralistic press enables individuals to receive diverse information, express opinions, scrutinize public authorities, and defend other fundamental rights (Otovescu, 2009). Consequently, the legal protection of press freedom represents not only a safeguard for journalists and media institutions, but also an important indicator of the democratic character of a state and of its commitment to respecting human dignity and civil liberties.

Algeria has witnessed successive stages in the development and legal regulation of public and private media institutions. The applicable laws regulate the right to information, the establishment and management of media institutions, oversight, broadcasting, and dissemination. This article aims to identify the legal guarantees for freedom of the written press, as these institutions are regulated by media laws and constitutions. Algerian journalism has known three types of laws: one issued under the single-party system, when the press served the government and journalists were employees and activists, and two issued under political pluralism, when newspaper establishment became free and journalists were no longer considered employees or activists. The press consequently enjoyed a margin of freedom that generated conflict between the press and the government.

## 2. Definition of the Written Press

The opinions of those interested and researchers regarding the definition of the press varied according to their position.

Among the definitions provided are:

It is the art of recording daily events with knowledge, regularity, and sound taste, while responding to the desires of public opinion and directing it, caring for human groups, transmitting their news, and describing their activities.

According to the liberal approach, it means:

"A tool for expressing the freedom of the individual through his right to exercise his political and civil liberties, foremost among which is his right to express his ideas and opinions, which is summarized in the principle of freedom of the press."

According to the socialist approach, it means:

"A social activity based on disseminating information of interest to public opinion. The press requires appropriate media outlets to disseminate social information, and these outlets are newspapers."

These definitions agree that:

The press is the most important means of conveying what is happening in society to citizens, and of guiding public opinion so that it can exercise control over the authorities, through the exchange of opinions and ideas between the ruling body and the governed. (Abu Zaid, 1998: 41)

Voltaire said: "The press is an unbreakable machine, used to destroy the old world so that it can create a new one." (Fahmi, 2003: 15)

We also find that the Algerian legislator, through the 2012 Media Law, defined the written press as a media activity, which is the dissemination of facts, events, messages, opinions, ideas, or knowledge through any written medium directed at the public or a segment thereof. (Organic Law No. 12-05 of Safar 18, 1433 corresponding to January 12, 2012, 2012)

The Media Law also stipulates in its second chapter, entitled "Media Activity Through the Written Press," which appears under the heading "Issuing Periodicals." Article 6 of this law states that "a periodical publication, within the meaning of this law, is considered to be newspapers and magazines of all kinds that are issued at regular intervals." Periodicals are classified into two categories. (Paragraph 2 stipulates that publications are classified into two categories: periodical publications for general information and specialized periodical publications)

## 3. The Concept of Freedom of the Written Press

"The written press is one of the media outlets and refers to newspapers. The latter are anything printed on paper and distributed at regular intervals. They are divided, in terms of formality and content, into newspapers and magazines. They are also divided in terms of publication dates. Newspapers are divided into morning, daily, weekly, biweekly, semi-monthly, and periodicals issued at specific intervals or once a year." (Hijab, 2003: 91)

As for freedom of the written press, numerous definitions have been provided, including:

"It is the right to issue newspapers and to own them by whomever they wish."

"- The right to publish whatever you want, and to be protected from any liability for such work, with the exception of obscene, atheistic publications, or publications containing scandals or slander, such as false publications or publications that harm a person's reputation or interests."

"- The government shall not interfere in what is published or impose its will on it by obligating or prohibiting what is published or related to the published material, or by suspending, confiscating, or canceling it, regardless of its orientations, ideas, and what is published in it, as long as it does not exceed the limits of the law."

" Professor Maurice Duguit defines it as:

"A general definition of the individual's right to express his or her opinions and beliefs through printed materials in all their forms, whether brochures, magazines, newspapers, or advertisements, without these publications being subject to prior authorization or censorship, with the author being held civilly or criminally liable.

From these definitions, we can derive the following definition:

"Freedom of the written press is the freedom to express opinions through writing, printing, and publishing, within the limits of the law."

The legal definition of freedom of the written press refers to the definition adopted by the laws regulating the press, and on the basis of which the government treats the press. Referring to Algerian Information Law No. 07/90, we find that it defines the written press through its definition of newspapers in Article 15, defining the latter as follows: (Law No. 90/01 of April 3, 1990: 459)(6)

"All newspapers and magazines of all types that are issued at regular intervals are considered periodical publications. Periodical publications are classified into two categories:

- General news papers
- Specialized periodicals."

As for General newspapers are periodical publications that constitute a source of information. Freedom of the written press includes three basic rights: freedom of the written press as a right of the writer, freedom of the written press as a right of the reader, and freedom of the written press as a right of communication. (Saouli, 2009-2010)

## 4. Freedom of the Press in Algeria

### 4.1. Before the French Occupation

Although the press appeared in Europe nearly two centuries before the French occupation, and despite our knowledge of the relations that linked the Algerian state with Europe, we did not find in the sources that chronicled that period any mention of the press in Algeria's relationship with Europe. The pages of history did not bear any mention of an Algerian press before the French colonization. Therefore, Algeria was not yet among the Arab countries in which the launch of the press in the technical sense was delayed, especially when the hooves of French horses trampled the land of Egypt during the Napoleonic campaign in Egypt. In this regard, Zuhair Ahdaden says: "The studies conducted to date prove that the press as a modern media outlet did not exist

in Algeria in the year 1830 is the year in which the French attacked the city of Algiers and seized it. This press also did not exist in the Arab world." (Ahdidan, 2002: 95)

### 4.2. The Colonial Period

When the French army prepared to invade Algeria, it brought with it equipment, including a printing press and an editorial board to oversee the publication of a newspaper that served as a link within the French army. This newspaper began publication with the French occupation of Algeria. It was the first newspaper published in Algeria, and bore the name "l'estafette de sidi ferrage." This newspaper was issued specifically for members of the occupation army and French employees of the French administration. Therefore, it relied on the French language. However, this newspaper soon ceased publication, and after it, the newspaper "Le moniteur algérien" appeared in 1832, during the reign of the French governor "De Rovigo." It served as the official newspaper of the French government in Algeria. It was the first official newspaper to have an Arabic supplement. Although its format was poor and difficult to understand, it was the first newspaper published in Algeria to address Algerians in their own language. It continued to be published until 1885, when it was banned. In 1862, it reappeared under the name "Monitor Algérien." "Then it ceased publication completely in 1871.

Al-Akhbar newspaper also appeared, which enjoyed great popularity from its publication in 1839 until 1898, the year it ceased publication. (Maaraf kalia, 2001: 77)

Abu al-Qasim Sa'dallah states that the date of its cessation of publication was 1939. It was published in French until 1903, when an Arabic section was added.

Several other French newspapers were published throughout Algeria, all of which supported French Algeria or the colonial authority. They served as a link between the occupiers and the colonists, and were somewhat distant from the Algerian people in general. (Ahdidan, 2002: 97)

In 1847, the French administration published the newspaper Al-Bashar. Despite being an official newspaper, it took upon itself the task of informing Algeria of French decisions and laws, as well as of sedating the Algerian people. While Algeria had learned about the press in general after 1830 from France, the foreign press, of course, was different in language, thought, belief, and goals. The French administration quickly established the first Franco-Arabic newspaper in 1877. Its goal was to publish the legislative texts of its colonial power. The newspaper's objectives were to strike at the resistance only. In 1903, journalist Victor Baroukan added an Arabic-language supplement to his newspaper Al-Akhbar. In the same year, L'Esprit Fontaine published the Arabic-language newspaper Al-Maghrib. Sheikh Mahmoud Kahoul, an employee of the French administration, was the weekly newspaper. However, the national Arabic newspapers came after the artist-painter Omar Rassem published the newspaper Al-Jazair in 1919, followed by the newspaper Al-Haqq in Oran in 1911. Both newspapers did not last long, as they were banned by the French occupation. In 1913, the newspaper Al-Farouk was published, owned by Sheikh Omar Ben Kaddour, and the artist Omar Rassem returned to publish the newspaper Dhu al-Fiqar.

### 4.3. After the French Occupation

Algeria inherited the French radio and television "la rie" on the eve of independence, as the broadcasting and radio services departments were established in France in 1944, and a decree was issued in 1945 granting the state the right to monopolize radio services represented by French radio and television. In 1959, the latter became a public institution with an industrial and commercial character. (Ahdidan, 2002: 99)

## 5. Legal Guarantees for Freedom of the Press in Algeria

Algeria has worked to enshrine freedom of the press and give it a global dimension, particularly after the transformations that occurred in its political, economic, and social systems, including the continuation of these transformations in human rights following the 1989 Constitution. To support freedom of the press, guarantees were established for it, both in the constitutions passed by Algeria and under the Media Law.

### 5.1. Constitutional Guarantees for Freedom of the Written Press

Freedom of the press, like other freedoms, is based on the basic legislation represented by the Constitution. The Constitution is defined as a set of fundamental principles regulating the powers of the state and is the fundamental and supreme law therein. Since independence, Algeria has worked to establish constitutional texts to affirm its recognition of human rights and outline ways to protect them. Among the rights of great importance, for which it has provided guarantees, is the right to freedom of the press and expression. All Algerian constitutional texts have included and recognized a wide range of public rights and freedoms enjoyed by individuals or groups, including freedom of the press and expression. However, these constitutions differed in the degree to which they recognized these freedoms and their nature, and this difference was due to the philosophy and nature of the political system in place. (Amocran, 2003: 10)

#### *5.1.1. Freedom of the Press under the Algerian Constitutions*

##### *5.1.1.1. Freedom of the Press under Socialist Constitutions*

The first Algerian constitution came into being one year after independence, and thus kept pace with the changes of that period. Care was taken to ensure that this constitution would serve the socialist trend adopted by the one-party system and the ruling regime at the time in Algeria. The 1963 Constitution included Article 84 (Tsadit, 2014-2015: 52), which addressed a number of issues, including freedom of expression, which in turn included freedom of the press, through Articles 4 and 19, as follows:

Article 4 of the 1963 Constitution states, "Islam is the religion of the state, and the Algerian Republic guarantees to every individual respect for his opinions and beliefs and the free exercise of his religious rites." Article 19 states, "The Algerian Republic guarantees freedom of the press and other media, freedom of association, freedom of expression, freedom of public intervention, and freedom of assembly."

We conclude from the text of Article 4 that it contains three types of freedoms:

- The individual's freedom of opinion, freedom of belief, and freedom to practice his religious rites, all of which are included before

- Freedom of expression, while Article 19 includes 19. Freedom of the press and the media, as well as freedom of expression, which here refers to freedom of speech and expression, are all manifestations of freedom of the press (Articles 4 and 19 of the 1963 Constitution of the People's Democratic Republic of Algeria, 1963)

This shows us that the constitutional founder did not neglect the right to freedom of the press and expression, and guaranteed them under legal provisions in the first constitution of the Algerian Republic. It was also the first constitution to stipulate in its provisions freedom of the press and freedom of opinion and expression, and did not mix them. It was thus the first to recognize freedom of the press independently of other freedoms. This is the greatest evidence of the importance of freedom of expression in general, and freedom of the press in particular, and its practice as a tool for developing and advancing society (Tsadit, 2014-2015: 5)

The 1976 Constitution (Order No. 97-76 dated November 22, 1976 promulgating the Constitution of the People's Democratic Republic of Algeria, Official Gazette, No. 94 dated November 24, 1976.) also responded to the aspirations of the Algerian people, and it was necessary to affirm the recognition of human rights and freedoms. This constitution included several articles that included human rights and fundamental freedoms. Article 39 of the 1976 Constitution states, "Human rights and fundamental freedoms are constitutionally guaranteed, and all citizens are equal in obtaining rights and performing duties, and there is no discrimination between them in any form."

This constitution also guaranteed the Algerian citizen freedom of belief and According to Article 53, which stipulates that "the sanctity of freedom of belief and opinion shall not be violated." Article 54 stipulates that "the citizen's freedom of intellectual, artistic, and scientific innovation is guaranteed within the framework of the law, and copyright is protected by law." Article 55 also affirms that "freedom of expression and assembly is guaranteed and may not be used to undermine the foundations of the socialist revolution." (See Articles 54, 39 and 55 of the Algerian Constitution of 1976)

The Algerian Constitution of 1976's enshrinement of freedom of expression in its provisions gives everyone the opportunity to think and express their opinions in various fields, and provides it with immunity in practice against any possible violations. This is what the aforementioned articles stipulate, along with the establishment of controls and conditions for its exercise. Finally, we can apply everything that has been said about the right to expression to the right to freedom of the press, given that it is an essential element of freedom of expression.

From what we have discussed, we note that the 1976 Constitution was devoid of any explicit mention of freedom of the press in its provisions, and was content to address it within the context of freedom of opinion and expression, as it considered freedom The press is a basic human right and therefore there is no longer a need for an explicit text on it. (Tsadit, 2014-2015: 53)

#### *5.1.1.2. Freedom of the Press under Liberal Constitutions*

The Constitution of February 23, 1989, differed (Presidential Decree No. 18-89 promulgating the Constitution of November 28, 1982, dated February 28, 1989, Official Gazette No. 09, issued in 1989) in its general framework from all previous constitutions that Algeria had known since independence, as it opened the door to democratic freedoms such as freedom of opinion, freedom of political openness, and the establishment of associations. Article 35 of the 1989 Constitution addressed the freedom to infringe upon freedom of opinion and belief: "The sanctity of freedom of belief and the sanctity of freedom of opinion shall not be infringed upon." This was followed by Article 36, which prohibited all institutions (except judicial institutions) from seizing any publication or any media outlet, and stipulated that "Freedom of intellectual, artistic, and scientific innovation is guaranteed to the citizen. Copyright is protected by law. No publication, recording, or any other means of communication or information may be seized except by a court order" (See Article 36 of the Algerian Constitution of 1989).

This article put an end to any potential deviation by the administration, which constitutes a strong guarantee of freedom of the media and media practice, a freedom that Algeria has not known since independence. The 1996 Constitution was amended to the 1989 Constitution. Among the most important articles related to freedom of expression is the exercise of the right to information by media institutions, which is found in Chapter One, concerning the general principles governing Algerian society.

Articles 36, 41, and 38 of the 1996 Constitution, amended in 2008, stipulate this freedom. Article 36 states that "the sanctity of freedom of opinion shall not be infringed," and Article 41 affirms that freedom of expression is guaranteed, stating, "Freedoms of expression and the establishment of social associations are guaranteed to citizens." Article 38 adds that freedom of intellectual, artistic, and scientific innovation is guaranteed to citizens.

Copyright rights are protected by law. No publication or any means of communication or information may be seized except by judicial order. This is the same as Article 36 of the 1989 Constitution (Constitution, Presidential Decree No. 438-96).

### *5.1.2. Other Constitutional Guarantees*

There are other constitutional guarantees protecting freedom of the press, including the principle of legality as a guarantee of freedom of the written press.

#### *5.1.2.1. The Principle of Legality as a Guarantee of Freedom of the Press*

The Algerian legislature has established guarantees to protect freedom of expression and freedom of the press by establishing measures to protect them in accordance with the provisions of the Penal Code. It subjects punishment, crime, and security measures to the principle of legality, as stipulated in Article 1 of this law: "There shall be no crime, no punishment, and no security measures without the law." (Law No. 09/01 dated 4 Rabi' al-Thani 1422)(23)

This means that judges are obligated to adjudicate and rule in accordance with what the law stipulates, as these legal provisions were included by the legislature with the intent of protecting freedom of expression, the press, and other intellectual freedoms from any action against them without a legal text. Thus, it becomes clear to us that the Penal Code guarantees every individual the right to exercise freedom of the

press, freedom of expression, and opinion, and to prevent their statements and actions from being criminalized, and to prevent them from being violated except by legislative texts indicating that the individual violated public order while exercising this freedom or exceeded the restrictions stipulated by the law. (Tsadit, 2014-2015: 5)

#### *5.1.2.2. Judicial Oversight*

This is one of the most important guarantees protecting freedom of the press. It is considered the spirit of this freedom, which, for its existence, requires not only a text establishing it, but also a fair court to adjudicate the opinions and ideas it raises that differ with the authorities. On this basis, judicial oversight based on the independence and competence of the judiciary guarantees the prosperity, reassurance, and maturity of the press. This oversight also prevents deviant legislation that undermines this freedom due to its violation of the constitution, because the executive authority often has access to legislation that is against this freedom, which is approved by members of parliament who support the government, and thus it can undermine the freedom of the press if it wishes. (Abdallah Muslimi, no year of publication, pp. 32-33)

### 5.2. Legislative Guarantees for Freedom of the Print Press

After independence, Algeria enacted several media laws aimed at regulating journalistic practice in Algeria, including:

#### *5.2.1. The 1982 Media Law*

This law came after the great vacuum experienced by the Algerian media space and the numerous developments that had occurred in society since independence. It also reflected the political context in which Algerian media institutions operated, namely the single-party system and the socialist system that Algeria had implemented (Qirat, 2003, pp. 129-130).

The law issued on February 6, 1982, restricted the scope of press freedom, influenced by the political orientation and ideological choices prevalent at the time.

The 1982 Media Law is considered the first law pertaining to the media since independence and contains a set of principles. Article 1 states, "The media is a sector of national sovereignty. The media, under the leadership of the National Liberation Front Party and within the framework of the socialist privileges specified in the National Charter, expresses the will of the revolution and translates the aspirations of the popular masses. The media works to mobilize and organize all sectors to achieve national goals."

Law 01/82 on the media also addressed a number of issues related to media activity and its objectives, and referred to the citizen's right to information, as stated in Article 23: "The right to information is a fundamental right for all citizens. The state shall work to provide complete and objective information." It defined the general guidelines for practicing media activity within the state's general policy stipulated in the Constitution and the National Charter. Article 3 of the law states, "The right to information shall be exercised freely within the framework of the country's ideological choices, the nation's moral values, and the directives of the political leadership emanating from the National Charter, taking into account the provisions contained in

the Constitution, particularly Articles 55 and 73 (See Articles 1, 2 and 3 of Law No. 01/82 mentioned above)."

### *5.2.2. The 1990 Media Law*

This law was issued on April 3, 1990 (includes the media law, Law No. 14 of 1990 (repealed)) in line with the country's new Constitution of 1989, which opened the door to political pluralism in accordance with the provisions of Article 40, which stipulated "the right to establish associations of a political nature," which logically included media pluralism. However, the law was preceded by a government circular dated March 19, 1990, which embodied the beginning of pluralism and independence of the press.

This law left journalists with the choice between remaining with existing media institutions, which are state institutions, establishing independent press institutions in joint-stock companies, or joining newspapers of political associations. It defined the types of periodicals that could be issued as follows:

- Independent newspapers with periodic publication.
- Scientific or cultural magazines.
- Specialized magazines linked to the state's sectoral activities.

The most important provision of the 1990 Media Law is what Article 2 stipulates: "The right to information is embodied by the citizen's right to full and objective access to facts and opinions of interest to society at the national and international levels, and the right to participate in the media by exercising fundamental freedoms of thought, opinion, and expression, in accordance with Articles 35, 39, and 40 of the Constitution."

Article 33 discusses the freedom to exercise the right to information: "The right to information shall be exercised freely, with respect for the dignity of the human person and the requirements of foreign policy and national defense." Article 43 clarifies the means of exercising this right:

This right to information is exercised particularly through the following:

- Media outlets and agencies in the public sector.
- Media outlets owned or established by associations of a political nature. (See the text of Articles 2 and 3 of the repealed Law 07-90 on the Media)
- Media outlets and agencies established by natural and legal persons subject to Algerian law It is exercised through any written, audio, or television broadcast. This shows us who... The first articles of this law waived the phrases representing the state and party's monopoly over the media sector. As for the remaining articles, the most important points can be read as follows:

We find Article 14 of Law 07-90 relating to the media: "Publishing a free periodical." This puts an end to the state's monopoly over the press with regard to ownership and publication. Furthermore, the law does not include anything that compels journalists to work specifically in media outlets affiliated with the party and the state, as in Article 33 of Law 82/01 (See Article 33 of Law 01-82 relating to the media (repealed)). Thus, the prohibition on the first pillar of freedom of the press in this law, namely the freedom to publish newspapers, which is a right for all citizens, is lifted.

In addition, it includes many restrictions that hinder freedom of the press. However, it is, in any case, a press law, unlike the 1982 law, which is considered a media law (Azouz, 2007-2008: 29)

### *5.2.3. The 2012 Media Law*

This law came after the reforms announced by President Abdelaziz Bouteflika, in support of democratic gains. It also aims to define the rules and principles governing the exercise of the right to information, while simultaneously promoting the free exercise of editorial activity and the democratic expression of ideas and opinions through media institutions. This law includes 133 articles distributed across 12 chapters (Madasi, 2011-2012, pp. 34-35).

Law 05-12 is considered an important step and progress in the exercise by media institutions and journalists of the right to information and in empowering citizens to do so. In this context, we find that Law 05/12 on the media preserved some positive provisions for the freedom of media institutions, related to the following articles:

Article 1 of Chapter 1: General Provisions, states the following: "This organic law aims to define the principles and rules governing the exercise of the right to information and the press."

However, Article 2 of Law 05-12 has been widely criticized in the media, and some journalists have considered it a clear regression in freedom of expression compared to the April 1990 law. This article tied media practice to vague conditions, such as respect for the spiritual values of society, national identity, and the requirements of state security, national defense, and economic interests. Journalists have even considered this article a relic of the single party (Article 2 of Law 05-12 relating to the media: The media is freely practiced within the framework of the provisions of this organic law and the legislation and regulations in force).

This law also stipulates the protection of the moral and social rights of journalists through Chapter Six, which addresses the profession of journalists and the ethics and morals of the profession. Article 78 stipulates that "professional journalists may establish editorial companies that contribute to the capital of the institution that employs them and participate in its management."

Organic Law 05-12 on the media also stipulates the absence of a state monopoly on the media and the free publication of newspapers, according to Article 11, which is the same as Article 14 of the previous Law 07-90 on the media. However, this law restricted the freedom to publish newspapers by increasing controls and complicating and rigorous procedures for publication, unlike the repealed Law 07-90 on the media (Tsadit, 2014-2015: 60).

## 6. Legal Obstacles to Freedom of the Press in Algeria

The legal regulation of freedom of the press, which aims to regulate its practice within a framework of freedom, is not considered an obstacle to its practice. Rather, this system is necessary to ensure that it does not deviate from the right path. However, expanding restrictions on freedom of the press when subjecting it to legal regulation in a way that overwhelms its freedom, whether in terms of publication or distribution, and subjects it to harsh legal restrictions, would limit its freedom and hinder its

practice (Saadi, No publication year: 112).

### 6.1. Newspaper Ownership

The right to publish newspapers in Algeria is vested in natural persons, public and private, and in the government. This is clear from the text of Article 4 of the Media Law, which stipulates that the right to information shall be exercised, in particular, through the following:

- Media titles and ready-made ones in the public sector
- Titles and devices owned or established by associations of a political nature
- Titles and devices established by natural and legal persons subject to Algerian law and exercised through any written, audio, radio, or television document

This article, on its face, contradicts Article 19, which requires a file for prior authorization to exercise the right to publish. The right to publish is not a right of the natural person, but of the legal person alone (Official Gazette of the Algerian Republic, Law No. 90-07 of April 3, 1990 relating to the media, Issue No. 14 issued on April 4, 1990: 460).

### 6.2. Prior Authorization Requirements

This is a system that, in its practical and practical application, does not differ from the prior authorization system, as the newspaper cannot publish before being provided with the receipt or authorization. This is what Article 14 of the Media Law stipulates: "The publication of a free periodical is a condition for its registration and the monitoring of its validity. A prior authorization must be submitted within a period of no less than 30 days from the publication of the first issue. The authorization must be registered with the public prosecutor with jurisdiction over the publication's location. The authorization must be submitted on sealed paper and signed by the director of the publication. A receipt must be given to the director immediately. The receipt must include the information. Regarding the publisher's identity and publication specifications, Article 19 of the Media Law states that the declaration must include a number of pieces of information, the most important of which are: "The purpose of the publication, its title, time and place of publication, the name, title, and address of its director, the commercial purpose and address of the printer, the name and address of the owner, and the capital of the company or institution." Article 21 of the Media Law requires that "the printer request a receipt from the publisher for the deposit of the declaration before any publication of his periodical."

The same law, in Article 79, punishes anyone who violates the provisions of Articles 14 and 19 with a fine ranging from 5,000 DZD to 10,000 DZD, along with the temporary or permanent suspension of the title or outlet (Official Gazette of the Algerian Republic: Article (54-55), same reference, pp. 460-461).

### 6.3. Transfer of License (Newspaper Ownership)

Algerian law has suggested that prior declaration regarding the transfer of ownership of the newspaper be made through the same declaration procedures. Article 20 stipulates that "any expression that affects the information specified in Articles 18

and 19 must be declared to the authority mentioned in Article 4 within 10 full days, keeping pace with the change."

### 6.4. Control of Sources of Capital and Income

Article 18 of the Media Law requires that "media titles and outlets must justify and declare the source of the funds that comprise their capital and the funds necessary for their operation. Likewise, any media title or outlet that receives any subsidy, regardless of its source, must..." It may be of a type, if it is organically linked to the body providing the aid, and this link is mentioned, except for the titles and media outlets affiliated with the public sector.

The same article also prohibits receiving direct or indirect aid from any foreign entity, whether a natural or legal person or a government.

The same law, in Article 81, punishes anyone who violates the provisions of Article 18. "Any director of one of the titles or media outlets mentioned in Article 4 who receives, in his name or on behalf of the publication, directly or indirectly, funds or benefits from a public or foreign body, with the exception of funds allocated to paying subscriptions and advertising according to the applicable tariffs and regulations (Official Gazette of the Algerian Republic: Article (54-55), same reference: 467) shall be punished by imprisonment from one to five years and a fine ranging from 30,000 to 3,000,000 DZD."

### 6.5. Prior Censorship

Article 21 of the Algerian Media Law requires the filing of a publication permit before the printing of any periodical. The same law also requires legal deposit prior to publication and circulation. Article 25 stipulates that:

- Periodical publications must be submitted for distribution in the following manner, regardless of the provisions relating to legal deposit stipulated in the applicable legislation. - Two copies of all publications, signed by the publication's director, shall be deposited with the regionally competent public prosecutor.

- Ten copies shall be signed by the publication's director and deposited with the National Library.

- Five copies of general media publications shall be signed by the director and deposited with the director in charge of the Interior. Article 84 of the Information Law also penalizes failure to comply with the filing formalities stipulated in Article 25.

- Failure to comply with the filing formalities stipulated in Article 25 shall be punishable by a fine ranging from 10,000 DZD to 50,000 DZD, without prejudice to the penalties stipulated in Articles 85 and following of this law (Official Gazette of the Algerian Republic: Article (54-55), same reference: 465).

### 6.6. Censorship of Media Content Received from Abroad

Algerian law makes the importation and distribution of foreign periodicals within the country subject to a prior license issued by the competent administration after consulting the Supreme Council for Media, as stipulated in Article 57 of the Media Law. Imports by foreign organizations and competent diplomatic missions are also subject to this license.

Article 58 stipulates that: In the event of failure to comply with the provisions of Article 57 above, the legally authorized authority may temporarily seize any written text, record, or any means of communication. Article 82 of the same law punishes the sale of foreign periodicals. The penalty for the sale of foreign periodicals prohibited from import and distribution in Algeria is imprisonment for one month to two years and a fine ranging from 1,000 DZD to 10,000 DZD, or one of these two penalties alone, without applying the Customs Code (Official Gazette of the Algerian Republic: Article (54-55), same reference: 465).

### 6.7. Control over the Sale and Circulation of Periodicals

Article 54 stipulates: "The sale and distribution of national and foreign periodicals on public roads or in any other public place is subject to prior authorization from the relevant municipality."

Article 55 specifies the contents of the authorization: "The authorization for street sales must include the name, surname, profession, address, residence, and date of birth of the declarant. A receipt, which serves as a form of authorization, shall be immediately and free of charge and shall be delivered to the declarant immediately and without charge." (Official Gazette of the Algerian Republic: Article (54-55), same reference: 463)

### 6.8. Government Council Oversight of the Press and Journalists

The Algerian legislator has imposed guardianship over freedom of the press and media through certain councils that play a role in controlling the profession and freedom of the press and media in Algeria. In accordance with Article 59 of the Media Law, the Supreme Media Council was established. Its composition is based on appointment of the president of the council and two other members by the President of the Republic, three members appointed by the President of the National People's Assembly, and six members elected by an absolute majority of professional journalists with at least 15 years of experience in the profession, as stipulated in Article 59. Article 72 of the Media Law, in this capacity, is the governmental body overseeing the media in Algeria, whether in print, radio, or television broadcasting. Article 59 defines the powers of this council, including:

- It ensures the dissemination and support of publishing and broadcasting in the Arabic language by all appropriate means.
- It prevents, through its decisions, the concentration of titles and media outlets under the financial, political, and ideological influence of a single owner.
- It determines, through its decisions, the conditions for the preparation, publication, production, programming, and dissemination of texts and quotas related to electoral campaigns.
- It expresses its opinion on disputes related to freedom of expression and thought that arise between media outlet managers and assists them in resolving them amicably.
- It exercises conciliation powers, at the request of the parties concerned, in cases of disputes related to freedom of expression and citizens' right to information, before the disputing parties take any action before the competent judicial authorities.

- It determines the rules for potential advertising and state assistance to media outlets, as well as their content and programming.

- It warns the concerned owners of the sale of certain assets in the event of abuse by certain controlling parties.

- It issues licenses and prepares specifications related to the use of radio electrical voltages. Television - expresses his opinion on the agreements concluded between owners and professional journalists (Official Gazette of the Algerian Republic: Issue 14, same reference: 467).

### 6.9. Prior Licensing for Journalistic Work

Article 30 of the Media Law specifies the conditions for granting a professional journalist card. The Supreme Media Council specifies the conditions for granting a professional journalist card, the entity that issues it, its validity period, how to cancel it, and the means of appeal. Furthermore, the Supreme Media Council's role is limited, if not virtually nonexistent, in resolving media disputes, given the subject matter of the disputes it has jurisdiction over and the non-binding nature of its decisions in this area.

### 6.10. Restrictions Related to Professional Secrecy

Article 30 of the Media Law stipulates that professional secrecy is a right for journalists, but it also imposes a set of restrictions on it before the judicial authority: Professional secrecy is a right and a duty for journalists subject to the provisions of this law. Professional secrecy may not be invoked against the competent judicial authority in the following cases:

- The scope of national defense secrecy, as defined in applicable legislation
- The scope of strategic economic secrecy
- Media that clearly affects state security
- Media that concerns children and adolescents
- Media that extends to judicial investigation and research (Bay, 2007: 75).

### 6.11. Restrictions on Access to Information and News Sources

The law gives professional journalists the right to access news sources and review documents issued by the public administration, but it restricts this to a set of conditions. Article 35 stipulates that "professional journalists have the right to access news sources. This right specifically prevents professional journalists from reviewing documents issued by the public administration that relate to the objectives of its mission, if they are not legally classified documents protected by law" (Official Gazette of the Algerian Republic: Issue 14, same reference, pp. 662-663).

Article 36 also specifies what may not be published: "The right to access news sources does not permit a journalist to publish or divulge information of the following nature:

- If it affects or threatens national security, national unity, or state security
- If it reveals a national defense secret or a strategic or diplomatic economic secret
- If it affects the rights and freedoms of citizens
- If it harms the reputation of the truth and judicial investigation

### 6.12. Investigation and Trial Procedures

#### *6.12.1. Mandatory Court Appearance during Proceedings*

Algerian Code of Criminal Procedure No. 66-155 of June 8, 1966, and its amendments, requires a journalist accused of committing a felony or misdemeanor related to the press to appear before the competent courts throughout the trial proceedings and up to the verdict. His failure to appear or appear is not permitted, even if he is represented by a lawyer during the trial.

#### *6.12.2. Arrest and Pretrial Detention of Journalists*

Algerian Code of Criminal Procedure No. 66-155 of June 8, 1966, and its amendments, stipulates that journalists may be arrested and remanded in custody in cases related to the press, whether before the public prosecutor during the investigation proceedings or before the competent court during the trial proceedings. (Official Gazette of the Algerian Republic: Issue 14, same reference: 662)

### 7. Conclusion

We conclude from the above that the Algerian legislator has provided regulation for the freedom of the written press, both legally and constitutionally, and has surrounded it with guarantees that ensure its exercise. Despite the latter, there are deficiencies and ambiguities that sometimes make it insufficient. Despite this, the written press sector remains much better than others compared to the audiovisual sector, which remains under the state's monopoly. This ensures the emergence of the written press towards a freer sphere by opening the written press sector to private individuals. On the other hand, there are numerous obstacles and impediments to the freedom of the Algerian press, which were mentioned above, making the profession and freedom of the press a challenge.

**References:**

1. Abdallah Muslimi, I. (n.d.). Media Legislation. Cairo: Dar Al Fikr Al Arabi.
2. Abu Zaid, F. (1998). Introduction to Journalism (ed. 2). Cairo: Alam Al-Kitab
3. Ahdidan, Z. (2002). The written press in Algeria (ed. 1). Algiers: Office of University Publications.
4. Al-Lamdani, M. (n.d.). Independent Press in Algeria (The Experience from Within, ed. 1). Algeria: Al-Haber Publications.
5. Amocran, T. (2003). The written press between authority and freedom (a comparative study). Department of Administration and Finance. Institute of Law and Administrative Sciences, University of Algiers.
6. Article 2 of Law 05-12 relating to the media: The media is freely practiced within the framework of the provisions of this organic law and the legislation and regulations in force. (n.d.).
7. Articles 4 and 19 of the 1963 Constitution of the People's Democratic Republic of Algeria, d. S. (1963, September 10). Official Gazette. (No. 64).
8. Azouz, S. (2007-2008). Public Liberties in the Algerian Legal System. Algeria: Faculty of Law, Ben Aknoun.
9. Bay, A. (2007). Obstacles to Freedom of the Press in Algeria - A Field Study in Press Institutions in the City of Constantine. Faculty of Humanities and Social Sciences. University of Constantine.
10. Constitution, Presidential Decree No. 438-96. (n.d.). amended by Law No. 19-08, dated November 15, 2008, Official Gazette No. 63 of 2008. Articles 41-38-36 of the Algerian Constitution of 1996, amended in 2008, Articles 41-38-36. Official Gazette No. 25 of 2002, of November 28, 1996, dated December 7, 1996, Official Gazette No. 76, dated December 8, 1996, amended by Law No. 03-02, dated April 10, 2002.
11. Fahmi, K. (2003). Civil Liability of Journalists for Their Journalistic Work. Azarita, Alexandria: New University Publishing House.
12. Hijab, M. (2003). The Media Encyclopedia (Vol. 4). no place of publication: Dar Al-Fajr for Publishing and Distribution.
13. includes the media law, Law No. 14 of 1990 (repealed). (n.d.). Law No. 07-90 dated Ramadan 8, 1410, corresponding to April 3, 1990.
14. Law No. 09/01 dated 4 Rabi' al-Thani 1422. (n.d.). amending and supplementing Order No. 156/66 dated 18 Safar 1386 corresponding to 8 July 1966. 34 of 2001, Articles: 21-20-19. containing the Penal Code of the Republic of Algeria N.
15. Law No. 90/01 of April 3, 1990. (n.d.). relating to the media, Official Gazette of the People's Democratic Republic of Algeria. (No. 14).
16. Maaraf kalia, I. (2001). Media: Facts and Dimensions (ed. 1). University Publications House for Publishing.
17. Madasi, B. (2011-2012). The Right to Information through Laws and Regulatory Texts of Media Institutions in Algeria. University of Algiers 3.
18. Official Gazette of the Algerian Republic, Law No. 90-07 of April 3, 1990 relating to the media, Issue No. 14 issued on April 4, 1990. (n.d.).
19. Official Gazette of the Algerian Republic: Article (54-55), same reference. (n.d.).

20. Official Gazette of the Algerian Republic: Issue 14, same reference. (n.d.).
21. Order No. 97-76 dated November 22, 1. p. (n.d.).
22. Order No. 97-76 dated November 22, 1976 promulgating the Constitution of the People's Democratic Republic of Algeria, Official Gazette, No. 94 dated November 24, 1976. (n.d.).
23. Organic Law No. 12-05 of Safar 18, 1433 corresponding to January 12, 2012. (2012). relating to the Algerian media for the year 2012.
24. Otovescu, C. (2009). Drepturile omului în societatea contemporană. Craiova: Scrisul Românesc.
24. Paragraph 2 stipulates that publications are classified into two categories: periodical publications for general information and specialized periodical publications. (n.d.). elating to the media stipulates that newspapers and magazines of all kinds that are issued at regular intervals are considered periodical publications within the meaning of this organic law.
25. Presidential Decree No. 18-89 promulgating the Constitution of November 28, 1982, dated February 28, 1989, Official Gazette No. 09, issued in 1989. (n.d.).
26. Qirat, M. (2003). Freedom of the Press in the Shadow of Political Pluralism in Algeria. Damascus Magazine, 19(3).
27. Saadi, M.-K. (n.d.). Obstacles to Freedom of the Press in the Arab World - An Analytical Study of Legal, Political, Social, Economic and International Obstacles (ed. 1).
28. Saouli, I. (2009-2010). Legal Guarantees for Freedom of the Written Press in Algeria. Department of Law, Faculty of Law and Political Science. Algeria: University of Mohamed Khider - Biskra.
29. See Article 33 of Law 01-82 relating to the media (repealed). (n.d.).
30. See Article 36 of the Algerian Constitution of 1989. (n.d.).
31. See Articles 1, 2 and 3 of Law No. 01/82 mentioned above. (n.d.).
32. See Articles 54, 39 and 55 of the Algerian Constitution of 1976. (n.d.).
33. See the text of Articles 2 and 3 of the repealed Law 07-90 on the Media. (n.d.).
34. Tsadit, Q. (2014-2015). Freedom of the Press in the Light of Political Openness in Algeria in Implementation of International Agreements. Department of International Human Rights Law, Faculty of Law and Political Science. Bouira, Algeria: Akli Mohand Oulhadj University.

# Youth Trajectories and Social Representations: Experiences, Pathways, and Frameworks of Perception Among Young People

**Naima HADJEB**
PhD Candidate, Abderrahmane Mira University - Bejaia (Algeria)
Email: naima.hadjeb@univ-bejaia.dz

**Mohamed Akli FARADJI**
Professor, Abderrahmane Mira University - Bejaia (Algeria)
Email: mohamedakli.faradi@univ-bejaia.dz

***Abstract:*** *This article offers a sociological analysis of youth trajectories through the lens of contemporary transformations of belief in Algeria. It builds on a previous quantitative survey conducted with 611 young people on the social representations of religion, further deepened by a qualitative study based on twenty semi-structured life-history interviews. The aim is to understand how young individuals construct their relationship to religion over the course of their trajectories in connection with their experiences of socialization and their interpretive frameworks. The study highlights differentiated forms of appropriation characterized by processes of individualization and the pluralization of reference systems. The trajectories analyzed reveal ongoing recompositions between beliefs, practices, and collective belonging, embedded in diverse social contexts. These findings underscore the structuring role of trajectories in the formation and transformation of social representations. The article thus shows that relationships to religion are shaped by processes of adjustment and redefinition within contemporary youth trajectories.*

*Research Question: How do youth trajectories contribute to structuring and transforming the social representations of religion among young people in Algeria?*

***Keywords:*** *Youth trajectories; Social representations; Youth; Religion; Socialization*

## 1. Introduction

Young people construct their identities, interpret social reality, and define their place in society through a continuous interaction between personal experiences and the relational environments in which they participate. From this perspective, sociality and sociability provide two complementary theoretical concepts for examining youth trajectories and social representations (Cioacă, 2024). Sociality refers to the broader institutional, normative, and cultural frameworks that shape young people's lives, whereas sociability concerns the concrete relationships and interactions through which meanings are transmitted, negotiated, and transformed. Youth perceptions of religion must therefore be understood as products of both biographical pathways and participation in family, peer, educational, religious, and digital networks.

Contemporary transformations of religion have constituted a central field of inquiry in the social sciences for several decades. Far from reflecting a simple decline of religion, numerous studies have highlighted dynamics of recomposition characterized by the individualization of beliefs, the diversification of practices, and the relative weakening of traditional institutional frameworks (Hervieu-Leger, 1999; Davie, 2007). In this context, youth emerge as a particularly relevant vantage point from which to observe these transformations, insofar as younger generations are both exposed to a plurality of religious references and engaged in biographical trajectories marked by reflexivity, experimentation, and identity negotiation.

In Algeria, young people's relationship to religion is embedded in a specific configuration. Religion remains a central reference point within the moral, social, and

symbolic order, while also being strongly framed by state institutions. Young people thus evolve within a space shaped by tensions between religious heritage, social norms, and identity-related challenges, contributing to the formation of complex and ambivalent relationships to religion that cannot be adequately understood through the sole categories of institutional practice or formal affiliation (Casanova, 1994).

The findings of a previous quantitative survey conducted with 611 young people provide an initial insight into these dynamics. This study highlighted the central role of family socialization in shaping young people's religious attitudes, with the majority of respondents reporting a strong proximity to their parents' religion. The family thus emerged as the primary agent of religious socialization, well ahead of school, religious institutions, and peer groups. However, these results also revealed more ambivalent positions: a significant proportion of young people reported an interest in religion while situating themselves outside the parental "religious circuit," whereas a minority expressed a more pronounced distancing from inherited models (findings from the author's previous Master's research).

While this quantitative survey made it possible to map religious attitudes and identify the main agents of socialization, it nevertheless left several key questions unresolved. By privileging a declarative and cross-sectional approach, it struggled to capture the discrepancies between belief, practice, and institutional affiliation, as well as the biographical adjustments through which young people negotiate their relationship to religion over time. In other words, while it enabled the measurement of proximities and distances with regard to parental religion, it did not fully account for the more subtle, individualized, or non-institutional forms of religious engagement.

It is precisely within this analytical space that the present article is situated. Following Grace Davie, who highlighted the phenomenon of *believing without belonging*, the aim is to move beyond a binary reading that opposes practitioners to non-practitioners in order to examine contemporary forms of religious engagement dissociated from institutional affiliation (Davie, 1994). Drawing on a qualitative study based on twenty semi-structured life-history interviews conducted with Algerian youth aged 18 to 35 from various wilayas in central Algeria, the article adopts an autobiographical approach that makes it possible to grasp religious trajectories in their processual and situated dimensions.

The analysis shows that the religious engagement of the young participants often unfolds outside traditional institutional frameworks, taking selective, individualized, and often low-visibility forms. Religion thus appears both as a moral and symbolic resource mobilized to make sense of the youth experience, and as a register of action shaped by different logics, requiring ongoing forms of negotiation within the social space (Lamine, 2020).

How do youth trajectories contribute to structuring and transforming the social representations of religion among young people in Algeria, and to what extent do these dynamics participate in the reconfiguration of forms of engagement, particularly in contexts marked by a distancing from institutional frameworks?

## 2. Conceptual Framework and Literature Review

### 2.1. Youth Trajectories and Biographical Temporality

The approach adopted is grounded in a sociology of trajectories, which conceptualizes youth pathways as evolving processes embedded in differentiated social and biographical temporalities. Trajectories are not reduced to a mere succession of events or statuses; rather, they refer to dynamic configurations shaped by experiences of socialization and by trials embedded within specific historical and local contexts.

In this perspective, and as Faradji (2025) emphasizes, the analysis of youth is less about explaining it through fixed categories than about understanding the processes through which it is constituted in its interactions with institutions and social frameworks.

Within this perspective, relationships to religion are analyzed not as inherited dispositions or automatic normative continuities, but as situated constructions, constantly readjusted through lived experiences and the interpretive frameworks mobilized by individuals. The analysis of life histories thus makes it possible to capture the processes through which social representations are recomposed, by highlighting the logics of appropriation, distancing, and reinvestment that structure forms of engagement across youth trajectories (Saoud and Sbiti, 2025).

### 2.2. Social Representations and the Construction of Meaning

In this study, social representations are understood as socially constructed forms of knowledge that enable individuals to make sense of their experiences, shape their judgments, and guide their practices. Drawing on the Durkheimian notion of "collective representations," this perspective emphasizes that categories of thought do not solely arise from individual consciousness; rather, they are embedded in shared symbolic universes that are transmitted, discussed, and sometimes contested (Goyard-Fabre, 1997). With Moscovici, social representations are conceived as systems of meanings in circulation, produced through interaction, which render objects intelligible, communicable, and evaluable within a given group. They therefore cannot be reduced either to private opinions or to official discourses; instead, they constitute interpretive frameworks that organize what young people perceive as "normal," "legitimate," "useful," or "problematic" in their relationship to religion (Michel and Zouaghi, 2025, pp. 4–6).

This approach is particularly heuristic for analyzing religion within youth trajectories, as it makes it possible to grasp how young people categorize and hierarchize elements such as belief, practice, belonging, morality, respectability, and authenticity. In other words, "religion" does not exist solely as an institution or a doctrine; it also exists as a represented object, embedded in processes of meaning-making, justification, and distinction. The key issue, therefore, is to understand how these representations are formed and transformed across multiple sites of socialization (family, school, peers, neighborhood, university, media), and how they become resources for interpreting biographical experiences. This perspective allows religion to be approached sociologically as a repertoire of meaning, mobilized in variable ways depending on situations: moments of trial, biographical transitions, identity recompositions, and adjustments to familial and local expectations, among others (Buschini and Lorenzi-Cioldi, 2024).

The articulation between social representations and youth trajectories ultimately leads to a shift in analytical focus. The aim is not merely to identify "what young people think" about religion (Mercier et al., 2024), but to demonstrate how these meanings are stabilized, recomposed, and actualized over the course of their trajectories. Social representations can thus be understood as flexible structures: relatively durable, as they are rooted in shared norms and inherited frameworks, yet also revisable, as they are confronted with lived experiences, normative tensions, and a plurality of available discourses (Drapeau, 2023). This perspective fully justifies our methodological approach: while the quantitative survey (611 young people) makes it possible to objectify regularities in perception and categorization (Hadjeb, 2026), the life histories derived from interviews enable an understanding of the biographical processes through which these representations take shape, become nuanced, sometimes contradictory, and are adjusted to lived contexts. The analysis of social representations thus becomes a privileged entry point for capturing the dynamics of belief—not as a fixed entity, but as a situated construction, historically and socially informed, embedded in trajectories.

### 2.3. Contemporary Reconfigurations of Belief

Contemporary scholarship in the sociology of religion converges on the idea that modernity does not lead to a disappearance of belief, but rather to a recomposition of the modes through which religion is socially embedded. However, this convergence encompasses different emphases that need to be articulated rather than simply juxtaposed (Hervieu-Léger, 1987). On the one hand, the emphasis on the mobility of affiliations and on the "desynchronization" of the different dimensions of religion (belief, practice, affiliation) invites us to conceptualize engagement as a biographical process. This is reflected in the notion of "religion in motion" developed by Hervieu-Léger, and in the dissociation captured by the concept of believing without belonging proposed by Grace Davie. These approaches make it possible to move beyond a strictly institutional reading of religion by showing how individuals construct their relationship to belief over the course of their trajectories, through processes of selection, adjustment, and reinvestment. Their potential limitation, however, lies in the tendency to suggest that recomposition primarily results from individual choices, whereas such choices remain socially conditioned and situated.

It is precisely this perspective that is further nuanced by the analyses of Lemieux, Campiche, and Lamine, which re-situate the recomposition of belief within social ecologies of meaning. For Lemieux, the contemporary crisis does not stem from a deficit of belief, but from the weakening of shared reference points and the increased circulation of meanings, rendering frameworks of legitimation more uncertain. Belief thus appears as a form of social work, in which the validity of a statement or symbolic resource tends to be assessed less by its institutional origin than by its lived relevance and perceived effectiveness (Willaime, 1993). Campiche, for his part, sheds light on the transformation of forms of belonging: the weakening of "full" affiliations does not imply the absence of regulation, but rather the emergence of more flexible, intermittent, or modular forms of adherence, adjusted to the constraints of individual trajectories (Campiche, 1993). Finally, Lamine provides a particularly effective framework for articulating trajectories and representations: the pluralization of references does not mechanically produce anarchic fragmentation, but rather situated forms of coherence

constructed through practical operations of composition, hierarchization, and justification. In other words, individuals do not simply "choose"; they arbitrate within configurations shaped by norms, processes of socialization, and competing symbolic offers.

These perspectives invite a shift in the analytical focus: the recomposition of religion is not merely a matter of privatization or interiorization, but rather a transformation of regimes of visibility and modes of regulation. It is here that the contributions of Casanova and Milot help to avoid two common reductions: reducing religion to the private sphere, or, conversely, subsuming it under an exclusively political logic. Casanova emphasizes that modernity can produce forms of public redeployment of religion (moral languages, identity repertoires, frameworks of judgment), which vary according to context. Milot, for her part, highlights the dispositifs that regulate what is considered sayable, visible, and legitimate, and thus the ways in which society concretely governs the expression of religion. These contributions are essential for understanding that distancing from institutions does not eliminate social constraint; rather, it displaces its sites, forms, and actors.

Taken together, these approaches make it possible to conceptualize youth religious engagement as a contemporary configuration characterized by: the biographical mobility of relationships to religion; the possible dissociation between belief, practice, and belonging; a process of meaning production and validation oriented by experience; more modular forms of affiliation; a pluralization of references and situated arrangements; and socially structured regimes of visibility and regulation. This theoretical framework thus provides a coherent basis for analyzing, through trajectories and life histories, the transformation of social representations of religion among young people in Algeria.

### 2.4. Youth and Religion in the Algerian Context

In the Algerian context, the analysis of youth trajectories must be situated within a social history marked by significant recompositions of normative frameworks and regimes of authority. The political and social transformations of the 1990s, along with the dynamics of identity redefinition that accompanied them, have contributed to reshaping the conditions under which religion is embedded in the experiences of younger generations. Religion, therefore, cannot be understood independently of these historical legacies, which continue to structure collective imaginaries and contemporary forms of engagement (Simon and Tiberj, 2016).

The work of Mohamed Marzouk (Merzouk, 2012) shows that youth religious engagements are shaped by tensions between collective memory, traditional continuities, and aspirations for autonomy. These tensions produce differentiated identity adjustments depending on local contexts and available resources. In this perspective, religion appears less as a simple transmitted inheritance than as a space of recomposition.

Building on these analyses, Abla Rouag, Amina Boulahrouf, and Houria Benloucif (Rouag, 2024) demonstrate that social representations of religion among Algerian youth are constructed at the intersection of multiple sites of socialization (family, school, university, neighborhood, media), generating sometimes competing configurations. Religion does not function here as a homogeneous block, but rather as a repertoire of meanings that can be mobilized according to situations and

interactional contexts. These studies thus highlight a pluralization of normative references and a diversification of modes of appropriation, where the continuity of tradition coexists with processes of individualization.

In this sense, young people's relationships to religion in Algeria can be understood neither as a mechanical reproduction of inherited norms nor as a radical rupture with the collective symbolic order. Rather, they are embedded in differentiated trajectories within which progressive recompositions of social representations unfold, articulating historical memory, contextual constraints, and dynamics of autonomization. Religion can thus be approached as a space of symbolic negotiation, situated within biographical temporality and within the structuring of contemporary youth trajectories.

## 3. Methodology

This article is based on a qualitative approach aimed at examining contemporary forms of religious engagement among young people through their biographical trajectories. The use of biographical inquiry responds to the objective of moving beyond a strictly declarative approach to religious attitudes by reconstructing the processes through which relationships to religion evolve over time, at the intersection of socialization, lived experiences, and life contexts. The adopted orientation is also grounded in biographical research, which recognizes the "biographical" as a constitutive dimension of processes of individuation, subjectivation, and socialization (Delory-Momberger, 2022).

Within a logic of sequential triangulation, the research design combines several data production techniques, mobilized in a complementary and progressive manner in order to strengthen interpretive robustness. The qualitative investigation first builds on a previous quantitative survey conducted with 611 young people on social representations of religion, whose findings informed both the research hypotheses and the construction of the interview guide. It is then developed through three components: biographical interviews, a focus group, and participant observation, allowing for the cross-analysis of discourses, interactions, and situated practices.

The study is primarily based on twenty semi-structured interviews incorporating life histories, conducted with young people aged 18 to 35 residing in different wilayas of central Algeria. Participants were recruited through purposive sampling, aiming at maximum variation in profiles (age, gender, level of education, socio-professional status, place of residence), without seeking statistical representativeness. Lasting between 60 and 90 minutes on average, the interviews were conducted using a flexible guide structured around several themes: religious socialization, practices and meanings attributed to religion, relationships to institutions, modes of expression and discretion, as well as the use of digital resources.

The autobiographical approach made it possible to trace the evolution of relationships to religion from childhood to adulthood, identifying continuities and processes of reappropriation.

In order to capture the interactive and normative dimensions of meaning construction, a focus group (Marková et al., 2004) was conducted with participants corresponding to the study population. This collective discussion enabled the observation of how categories are debated, how arguments circulate, and how mechanisms of legitimation and disqualification operate among peers, particularly

with regard to the boundaries of "legitimate religion," practices deemed acceptable or not, and contemporary forms of engagement.

Finally, participant observation was employed to document everyday contexts of socialization and situated modes of religious expression, as well as the interactions through which normative reminders are enacted. Observation focused on everyday spaces of sociability (depending on accessibility: neighborhood settings, events, associations, meeting places) and was recorded through systematic field notes, carefully distinguishing between descriptions, interpretations, and reflexive elements.

Data analysis relied on thematic analysis combined with a trajectory-based reading, in order to identify regularities, contrasts, and typical configurations within the narratives. The triangulation of interviews, focus group data, and participant observation made it possible to refine interpretation, identify potential gaps between discourse and practice, and better understand the social frameworks of perception mobilized by participants. Particular attention was paid to significant biographical moments (trials, transitions, relational reconfigurations) and to social contexts (family, peers, territory, digital resources) structuring the observed recompositions.

In accordance with ethical principles in social science research, participants' anonymity was ensured and informed consent was obtained. A reflexive stance was maintained throughout the research process and analysis in order to account for the conditions of data production and the effects of the research relationship. Bibliographic references were collected and organized using the Zotero software and formatted according to APA style (7th edition).

## 4. Findings: Contemporary Figures of Youth Religiosity

The analysis of the collected life histories highlights forms of youth religious engagement marked by an increasing dissociation between belief, practice, and institutional affiliation. The trajectories examined reveal plural, evolving, and strongly situated relationships to religion, which cannot be adequately captured through a binary opposition between practitioners and non-practitioners.

### 4.1. Dissociation Between Belief, Practice, and Belonging: "Modular" Engagement

The analysis of individual trajectories reveals a structural dissociation between the three classical pillars of religious experience: belief (inner adherence), practice (ritual observance), and belonging (institutional affiliation) (Champion, 1999; Mercier et al., 2024; Lefebvre, 2012). This disaggregation reflects a shift from a religion of inheritance and discipline toward a form of modular engagement, in which the individual becomes the arbiter of their own normativity.

The case of Smaïl (35 years old) illustrates the privatization of belief. By abandoning regular practice and mosque attendance while maintaining a form of "religion of the heart," he exemplifies what Grace Davie conceptualizes as believing without belonging. Here, faith is disconnected from institutional frameworks and relocated within the inner self. Religion does not disappear; rather, it changes locus: it shifts from the public and communal sphere to become a resource of intimacy, a conviction detached from the constraints of visibility or collective discipline.

Conversely, Akila's trajectory (29 years old) reflects a logic of bricolage and normative arbitration, characteristic of what Danièle Hervieu-Léger theorizes as "religion in motion." Her selective reinvestment in ritual practices (prayer, fasting,

plans for pilgrimage) coexists with the persistence of heterodox behaviors (occasional alcohol consumption), justified through personal interpretation. The sociological interest here lies not in measuring a degree of piety, but in observing how the modern subject produces their own religious coherence. Akila does not reject norms; rather, she reorganizes them through a form of identity-based pragmatism, selecting the prescriptions she considers essential to maintaining her relationship with the sacred, while allowing herself margins of autonomy within a secular lifestyle.

Finally, the observation of persistent anchors, such as the practice of Ramadan, highlights the resilience of the social function of ritual. Even when everyday practice weakens, certain markers retain a strong symbolic charge as "social facts" in the Durkheimian sense. Ramadan no longer operates solely as a theological prescription, but as a mechanism of cohesion and classification. It functions as a ritual of integration that reactivates collective memory and reaffirms belonging to a familial and cultural lineage. These "minimal anchors" demonstrate that religion, beyond individual belief, remains a system of signs essential to the stabilization of social identity and the reiteration of communal bonds, particularly in contexts marked by mobility or the fragmentation of life trajectories.

### 4.2. Contrasting Socializations and the Plurality of Authorities: Family, School, Community, and Associations

The cross-analysis of trajectories shows that contemporary religiosity no longer stems from a monolithic mode of transmission, but rather from a plurality of socializing instances that are often in tension with one another. Far from inheriting a unified dogmatic corpus, individuals are shaped at the intersection of heterogeneous mediations—family, school, the village, associational networks, and the broader social environment—which function as competing normative matrices.

This pluralization of authorities generates situations of strong normative dissonance, compelling individuals to navigate within a religious field marked by conflicts of legitimacy. The trajectory of one of the participants provides a particularly illuminating example of these dynamics: her religious ethos was first formed through the compromise embodied by a maternal lineage perceived as "open," within a maraboutic village environment, before later being confronted with the prescriptions of the school institution—where religious practice was indexed to social respectability—and subsequently, with the rigorist orthodoxy of a father trained in the networks of medersas and zaouïas. From a Bourdieusian perspective, this trajectory illustrates a struggle over the monopoly of religious authority: the individual finds herself at the center of a confrontation between several forms of symbolic capital, each seeking to impose the legitimate definition of the "good Muslim woman."

To this conflict of authorities is added the weight of historicity and local embeddedness, particularly visible in the trajectory of one of the participants, Smaïl (35 years old). His childhood, marked by the trauma of the political violence of the 1990s, was intertwined with a return to the maraboutic reference points of the Kabyle village. Religion is therefore not merely an intimate matter; it is deeply embedded in the upheavals of collective history, functioning at times as a constraining framework and at others as a resource for stabilization in the face of uncertainty. Smaïl's adolescent involvement in formal structures (the mosque, associations), followed by

his disengagement in adulthood, echoes the normative redefinitions observed in Akila's trajectory (26 years old).

Taken together, these two trajectories strongly support Danièle Hervieu-Léger's thesis of "religion in motion." Religious engagement appears here not as a static state or a fixed habitus, but as an eminently mobile process, biographically situated, and marked by oscillations between phases of institutional intensification and periods of intimate withdrawal. Smaïl's retreat or Akila's accommodations do not indicate an anomic rupture, but rather a reconfiguration of the believing experience.

Ultimately, the end of the monopoly of singular familial or communal transmission gives rise to a profoundly "composed" religiosity. Subjected to prescriptions that are sometimes paradoxical—emanating from school, village tradition, or dogmatic reinventions—the individual is compelled to produce the meaning of their own practice. This pluralization of mediations undeniably opens up a space for autonomy and subjectivation, yet it also paradoxically transforms religious coherence into a genuine cognitive and identity-based labor, in which each subject must arbitrate, over the course of their biography, the terms of their own respectability.

### 4.3. Respectability, Reputation, and Gendered Social Control

One of the major contributions of this empirical material lies in revealing a moral economy of respectability, in which religious adherence functions less as a quest for transcendental salvation than as a central operator of everyday social reputation. Religiosity is thus embedded within a system of mutual surveillance, where conformity to norms becomes a condition of acceptability within the group.

The narrative of A. (26 years old) provides a particularly sharp illustration of the operation of an informal moral policing, enacted by neighbors, peers, and extended kin through mechanisms of micro-sanctions (remarks, criticism, and forms of humiliation). In this context, religiosity is never a strictly private matter (between the individual and God), but rather a public performance subject to the gaze of a "social panopticon." The episode in which A.'s prayer is mobilized to highlight a supposed incompatibility with her mode of dress reveals how ritual itself can be turned against the subject as a means of disqualification. Sociologically, rumor and public exposure can thus be understood as mechanisms of social regulation, contributing to the maintenance of a moral order through the visibility and disapproval of behaviors perceived as non-conforming.

This regulation is intrinsically gendered: the female body (clothing, makeup, spatial mobility) constitutes a privileged site for the projection of social control. Women's religious practices are therefore more exposed to symbolic sanctions, transforming each gesture into a stake in reputational survival. From a Bourdieusian perspective, these interactions can be analyzed as struggles over the preservation of symbolic capital: the alternative between being "well regarded" (respectable) or "poorly regarded" (discredited) ultimately determines access to recognition and social security within the community.

Conversely, the case of another participant, Smaïl (26 years old), highlights a masculine modality of this quest for respectability. While social control is exercised less directly upon the male body, it is displaced toward the expectation of behavioral exemplarity. Institutional engagement (mosque, associations) during adolescence

operates as a mechanism for the production of a "respectable" and disciplined masculinity. In this case, religious investment is less about avoiding shame than about accumulating a form of moral credibility and seriousness, which reinforces the individual's authority and reliability in the eyes of the group. In both cases, religiosity appears as an essential social language through which individuals negotiate their place and value within the moral architecture of society.

### 4.4. Biographical Crises and the Reinvestment of Religion: Symbolic Resources and Identity Reconfigurations

The analysis of the interviews highlights a robust finding: the reactivation of religion occurs primarily during moments of biographical rupture and vulnerability. In such contexts, religion is not experienced as a dogmatic constraint, but rather as a mechanism of symbolic remediation and a therapeutic resource, enabling individuals to cope with existential disorder.

The trajectory of one of the participants illustrates a form of situational and targeted religiosity. In the face of psychological suffering and bereavement, recourse to listening to the Qur'an or praying for the deceased functions as a tool of appeasement and a means of managing uncertainty. What is at stake here is not a lasting institutional re-engagement, but an instrumental mobilization of the sacred: religion provides an immediate framework of re-centering, a temporary compass that helps stabilize the subject in the face of adversity.

For Akila (26 years old), the return to religion takes on a more holistic dimension of refuge and reconstruction. The crisis—marked by paternal bereavement, loss of bearings, and a sense of social shame—triggers a desire for a "new beginning." This process of return operates on three levels of her existence: on the moral level, by providing a system of meaning through which to reorient her choices; on the relational level, by facilitating the restoration of bonds of affection and trust with those around her; and on the social level, by acting as a lever for the recovery of her respectability within the group.

From a Durkheimian perspective, these returns to religion confirm that ritual and reference to the sacred help stabilize existence in periods of anomie by reconnecting the individual to a shared order of meaning. However, a more processual approach makes it possible to view this as a genuine mechanism of biographical repair. Returning to religion enables the subject to "re-narrate" their life: the experience of rupture is converted into a transitional stage toward a more coherent identity: "I am beginning another life."

Taken together, these trajectories support Danièle Hervieu-Léger's perspective: identity continuity is no longer constructed through linear institutional belonging, but through the subject's capacity to mobilize, in response to life's trials, fragments of the religious "chain of memory" in order to recreate meaning and reorder the life course.

### 4.5. Digital Media in Youth Trajectories: Resources and the Reconfiguration of Religious Representations

The analysis of participants' trajectories shows that digital resources no longer function merely as informational supports, but now actively contribute to structuring contemporary relationships to religion. Digital platforms (YouTube, TikTok, social media) tend to reconfigure traditional mediations by interposing the screen between

the individual and the institution, thereby contributing to a displacement of sources of authority and a diversification of instances of legitimation.

This process is part of a broader dynamic of the relative autonomization of actors and the development of selective forms of religious appropriation.

In some trajectories, digital media appear as resources mobilized during moments of biographical trial. In situations of vulnerability or bereavement, recourse to online narratives and Qur'anic recitations makes it possible to activate symbolic reference points without relying on classical institutional mediations. This mode of use illustrates a pragmatic form of religiosity, grounded in the immediate availability of content and in its capacity to produce a sense of subjective appeasement. Religious authority therefore tends to be assessed less according to the institutional position of the speaker than according to the perceived relevance and symbolic efficacy of the content mobilized.

For one of the participants, digital media appear as a support for reflexive autonomy and normative arbitration. Positioned at the intersection of tensions between a relatively "open" family socialization and more demanding expectations stemming from the paternal environment or the local context, she uses digital platforms as a space for comparing discourses and elaborating her own position. Digital media thus constitute a discreet site of learning, allowing for the gradual appropriation of prescriptions and practices at a distance from immediate social scrutiny. This selective navigation encourages the choice of speakers and content perceived as compatible with her way of life, inscribing religious engagement within a logic of elective and personalized appropriation.

From a sociological perspective, this recourse to digital media marks a break with the vertical and local transmission of knowledge. What emerges is a horizontalization of authority: the neighborhood imam loses his monopoly in favor of a plurality of globalized figures, often disconnected from local cultures, echoing Olivier Roy's notion of "religion without culture." Among the participants, digital media support the emergence of a chosen and reflexive religiosity. They no longer appear solely as heirs to a transmitted tradition, but as actors engaged in an active process of appropriation and selection among available references. By circulating through fragmented content, they gradually compose a religious identity articulated with their experiences, constraints, and aspirations.

In sum, digital media can be understood as an operator of recomposition in contemporary forms of belief, in resonance with Danièle Hervieu-Léger's idea of "religion in motion." They provide a set of symbolic resources that sustain processes of appropriation and identity redefinition. These digital circulations enable individuals to maintain a continuity of reference in belief while loosening their embeddedness in collective and communal frameworks of regulation.

## 5. Synthesis of Findings

This research does not primarily situate itself as a direct extension of recent studies on youth religiosity in Algeria, although it engages in dialogue with them. It is first and foremost grounded in a previous study conducted as part of a Master's thesis, focused on the social representations of religion among Kabyle youth, carried out in 2014 with 611 respondents. While this initial quantitative research made it possible to identify regularities in perceptions, attitudes, and positions, the present study pursues

a different objective: to understand how these meanings are formed, displaced, recomposed, and become operative over the course of individual trajectories.

In other words, the aim is no longer simply to identify what young people think about religion, but to analyze the social and biographical logics through which these representations are produced, internalized, transformed, or sometimes distanced within lived experience. The shift from a quantitative survey to a qualitative approach based on life histories has enabled precisely this analytical repositioning: moving from the register of opinions to that of processes, from declared positions to the concrete conditions of their formation, transformation, and enactment.

Within this perspective, the works of Abla Rouag and her colleagues, as well as studies focusing on forms of religious renewal associated with the figures of the "born again" or *tawba* (notably Tozy), alongside Merzouk's work, are mobilized here as points of comparison rather than as a direct analytical framework. These studies have highlighted contemporary forms of religious reinvestment, often conceptualized as dynamics of return, moral reorientation, or subject transformation. Without questioning the relevance of these analyses, the biographical material collected in this study invites a nuanced reconsideration of the centrality of the "return" paradigm, in favor of a more processual, gradual, and situated understanding of religious engagement. This perspective aligns with the idea of a mobile religiosity, continuously recomposed throughout trajectories and biographical trials (Lahsenh, 2017).

A first structuring finding concerns the dissociation between believing, practicing, and belonging. The persistence of a "religion of the heart," despite the abandonment of regular practice and mosque attendance, illustrates a form of deinstitutionalized engagement that should not be equated with an exit from religion. Conversely, the selective reinvestment in ritual practices by another participant (prayer, fasting, plans for pilgrimage), coexisting with behaviors not aligned with strict orthodoxy, highlights a logic of practical coherence rather than doctrinal conformity. Here, religion operates as a repertoire of meanings that are hierarchized and rendered practicable through personal interpretation. These configurations call for a reconsideration of analyses centered on the "born again" or tawba figure as a dominant model: while not excluding trajectories of transformation, the data primarily point to gradual, modular, and biographically embedded recompositions.

A second finding concerns the importance of historicity and local embeddedness. In certain trajectories, religious experience is articulated with collective memory—particularly the events of the 1990s—and with local reference frameworks (such as maraboutism and village affiliations), revealing that religion also functions as a resource of symbolic anchoring and stabilization in contexts of uncertainty. Thus, even when belief becomes increasingly subjectivized, it remains deeply embedded in social, territorial, and mnemonic configurations that shape interpretive frameworks.

A third finding highlights the relational and normative dimension of religiosity. One participant's narrative illustrates that religion is not merely a private matter, but is embedded in everyday interactions where social regulation is exercised (through remarks, criticism, and forms of humiliation). Ritual practices and religious markers can become supports for public evaluation, producing classifications and disqualifications. This observation calls for a reconsideration of the notion of "privatization": distancing from institutional frameworks does not eliminate social

constraint; rather, it may reconfigure it by relocating it to relational arenas where the boundaries of legitimacy are negotiated on a daily basis (Simon and Tiberj, 2016).

## 6. Conclusion

This article has shown that youth religiosity in Algeria can be understood neither as a simple withdrawal from religion nor as a homogeneous "return," but rather as a processual recomposition embedded in individual trajectories. The analysis of life histories highlights modular configurations in which belief, practice, and institutional belonging may become dissociated and rearranged over the course of the life course. The forms of engagement observed often stem from situated normative arbitrations aimed at achieving a practicable coherence in everyday life, rather than from stable doctrinal conformity.

The trajectories also underscore the role of historical legacies and local embeddedness in the stabilization or transformation of religious meanings. They further show that religion remains embedded in ordinary interactions and relational frameworks of regulation, which structure the modalities of expression and discretion. The triangulation with the earlier quantitative survey (Master's research, 2014; 611 young respondents) confirms the plurality of interpretive frameworks while also making it possible to grasp their biographical genesis.

Overall, the articulation between youth trajectories and social representations sheds light on religion as a socially situated work of meaning, shaped by successive processes of adjustment, reappropriation, and actualization.

## References:

1. Buschini, F., and Lorenzi-Cioldi, F. (2024). Social representations. In L. Bègue-Shankland (Ed.), *Handbook of Social Psychology: The Science of Human Interactions* (2nd ed., pp. 403–421). De Boeck Supérieur. https://hal.science/hal-04726205
2. Campiche, R. J. (1993). Individualization of belief and the recomposition of religion. *Archives de sciences sociales des religions*, 38(81), 117–131.
3. Casanova, J. (1994). *Public Religions in the Modern World*. University of Chicago Press. https://press.uchicago.edu/ucp/books/book/chicago/P/bo3683997.html
4. Champion, F. (1999). Hervieu-Léger (Danièle), *The Pilgrim and the Convert: Religion in Motion*. Archives de sciences sociales des religions. https://www.persee.fr/doc/assr_03355985_1999_num_108_1_1097_t1_0079_0000_2
5. Cioacă, V. O. (2024). Sociality: Structures, Processes, and Implications in the Study of Human Behavior. *Revista Universitară de Sociologie*, 20(2), 496–514.
6. Delory-Momberger, C. (2022). Biographical research in education: Emergence, project, and challenges. *Le sujet dans la cité*, Actuels No. 12(2), 27–37. https://doi.org/10.3917/lsdlc.012.0027
7. Drapeau, E. (2023). Social representations and stereotypical figures: The Catholic, the believer, and the practitioner. *Studies in Religion / Sciences Religieuses*, 52(3), 381–400. https://doi.org/10.1177/00084298221111211

8. Faradji, M. A. (2025). THE SOCIOLOGY OF YOUTH BETWEEN A SATURATED APPROACH AND A RENEWED ANALYSIS. Https://Doi.Org/10.5281/ZENODO.16743588
9. Goyard-Fabre, S. (1997). *The Philosophical Principles of Modern Political Law* (1st ed.). Presses Universitaires de France.
10. Hervieu-Léger, D. (1987). Should religion be defined? Preliminary questions for constructing a sociology of religious modernity. *Archives de sciences sociales des religions*, 32(63.1), 11–30.
11. Lahsenh. (2017). *The Pilgrim and the Convert: Religion in Motion* by Danièle Hervieu-Léger. Anthropos.hira. https://anthropohira.wordpress.com/2017/08/30/le-pelerin-et-le-converti-la-religion-en-mouvement-daniele-hervieu-leger/
12. Lamine, A.-S. (2020). Religious identities, community belonging, and social participation. *Revue du droit des religions*, 10, 105–121. https://doi.org/10.4000/rdr.1234
13. Lefebvre, S. (2012). Youth and religion: The age of quest… always? (pp. 263–278). Retrieved April 3, 2026, from https://scholar.google.com/scholar_lookup?title=Jeunesse+et+religion%3A+l%E2%80%99%C3%A2ge+de+la+qu%C3%AAte%2C+depuis+toujours%3F&author=S+Lefebvre&publication_year=2012&pages=263-278
14. Marková, I., Zittoun, T., and Orfali, B. (2004). Language and communication in social psychology: Dialogue in focus groups. https://doi.org/10.3406/bupsy.2004.15338
15. Mercier, C., Cornelio, J., and Warren, J.-P. (2024). Young people and religious actors in a globalized world: Introduction. *Social Compass*, 71(1), 3–25. https://doi.org/10.1177/00377686241240693
16. Merzouk, M. (2012). New forms of youth religiosity: A study in the student milieu. Insaniyat, 55–56, 121–131. https://doi.org/10.4000/insaniyat.13535
17. Michel, G., and Zouaghi, S. (2025). Serge Moscovici: Social representations and active minorities.
18. Rouag, D. A. (2024). Young Algerians and Their Relationship with Religion: Between Fundamental Adherence and Contradictions. UNITED EUROPE, (21).
19. Saoud, H., and Sbiti, M. (2025). Youth and deinstitutionalization: Towards a capability-based governance of biographical trajectories. *International Journal of Accounting, Finance, Auditing, Management and Economics*, 6(12), 125–136.
20. Simon, P., and Tiberj, V. (2016). Secularization or religious revival: Religiosity among immigrants and their descendants. In C. Beauchemin, C. Hamel, and P. Simon (Eds.), *Trajectories and Origins* (pp. 559–582). Ined Éditions. https://doi.org/10.4000/books.ined.976
21. Willaime, J.-P. (1993). Contemporary transformations of belief in light of recent surveys. *Archives de sciences sociales des religions*, 38(82), 239–245.

# Psychosocial Alienation Among Digital Content Followers on TikTok: The Structural Friction Between Virtual and Real Identities A Digital Ethnographic Study

**Hanane BOULBAZINE**
University of Cheikh Larbi Tebessi – Tébessa (Algeria)
Email: hanane.boulbazine@univ-tebessa.dz
**Faiza BOUZID**
University of Cheikh Larbi Tebessi – Tébessa (Algeria)
Email: faiza.bouzid@univ-tebessa.dz

***Abstract***: *Users and followers of the TikTok application are increasingly navigating a critical state of psychosocial alienation, characterized by a profound socio-cognitive disorientation between the curated digital identity they attempt to embody and the tangible, real-world identity that binds them to their immediate social reality. This empirical study examines the psychosocial impacts of algorithmically driven "Lifestyle" content on TikTok and explores how followers negotiate the structural tensions and subsequent feelings of non-belonging arising from this identity fragmentation. Adopting a blended digital ethnographic framework (Netnography), the research involved prolonged participant observation and multi-layered, semi-structured in-depth interviews with a purposive sample of Algerian female followers (including undergraduate university students, adolescent high schoolers, and housewives) in Tebessa. The empirical findings reveal that immersive consumption of algorithmically curated lifestyle narratives systematically fosters a normalized rejection of local economic and material realities, catalyzing chronic existential dissatisfaction and severe domestic friction. Furthermore, the persistent oscillation between the desired virtual persona and the unaccepted offline environment induces an acute identity shock that impedes the formation of a cohesive self-concept. The study concludes that TikTok functions as a powerful psychological apparatus that re-engineers individualistic, hyper-consumerist paradigms while systematically marginalizing traditional familial norms. Consequently, there is an urgent imperative for primary socialization institutions to update their communicative strategies and deploy intervention mechanisms to safeguard youth identity and preserve collective social cohesion in the hyper-digital era.*

***Keywords:*** *Digital Identity; Real Identity; Psychosocial Alienation; TikTok Application; Digital Ethnography*

## 1. Introduction

Psychosocial alienation constitutes a defining pathology of the modern era, manifesting as acute psychological imbalance, social disorientation, and a profound sense of cultural disaffiliation. This phenomenon is increasingly driven by the hybrid identity constructs and cultural narratives engineered by social media platforms, which frequently collide with the user's immediate physical environment. Through its highly immersive, algorithmically driven ecosystem, TikTok has systematically reshaped the psychological and social landscapes of its users. By fostering a compelling "digital identity" sustained through intense affective, cognitive, and behavioral influences, the platform projects idealized lifestyle paradigms. Consequently, users often experience a state of subjective immersion and cognitive absorption that detaches them from tangible reality.

This structural dynamic culminates in a psychological shock, leaving individuals suspended in a liminal space between their lived social reality and a simulated digital identity. Departing from this conceptual framework, this digital ethnographic study addresses a primary research question : How does psychosocial alienation manifest among TikTok followers amidst the structural disparity between their digital and real-world identities? To operationalize this inquiry, the following sub-questions are explored:

- **Q1:** What architectural and stylistic features characterize the digital identity reinforced by TikTok content among its followers?
- **Q2:** How do the psychological and social dimensions of this replicated digital identity manifest within the daily lives of users?
- **Q3:** How do followers navigate and negotiate the tension between their digital identity and real identity within the context of psychosocial alienation?

### 1.1. Study Objectives

The primary objectives of this study are outlined as follows:

1. To explore the defining characteristics of digital identity and the subsequent manifestations of psychosocial alienation induced by TikTok content.
2. To analyze the lived psychological and social dimensions of the replicated digital identity internalized by the platform's followers.
3. To interpret how users experience and manage the structural tension between their virtual and real-world identities under the weight of digital alienation.

### 1.2. Significance of the Study

The value of this research lies in its dual contribution to theory and practice:

- **Theoretical Significance:** It addresses a critical gap in contemporary digital sociology and media psychology regarding how short-form video algorithms disrupt traditional identity formation and catalyze modern forms of alienation.
- **Methodological and Practical Significance:** By employing a digital ethnographic framework, this study provides deep, qualitative insights into the mechanics of virtual identity construction, offering educational stakeholders and mental health professionals a grounded understanding of algorithmic impact on youth well-being.

## 2. Conceptual and Operational Definitions

### 2.1. Psychosocial Alienation

- **Conceptual Definition:** Alienation is defined across various sociological and psychological lexicons as a state of estrangement. *The Dictionary of Social Sciences* conceptualizes it as “referring to a state of estrangement or separation between parts of the personality and the aspects indicative of external experience”. This implies a fundamental schism between the subjective self and the objective world, wherein aspects of the self become detached and externalized (Khious, 2022: 82). Furthermore, *The Gale Encyclopedia of Psychology* defines alienation as “a strong feeling of isolation and loneliness, resulting from a variety of causes including: a response to specific events or situations in society or in the individual's personal life” (Khious, 2022: 83).

- **Operational Definition:** Within the scope of this digital ethnographic study, psychosocial alienation is operationally defined as a subjective state of socio-cognitive detachment and anomic disaffiliation from the traditional community. It manifests as a deliberate withdrawal from real-world social and psychological obligations, driven by the immersive consumption of TikTok content, which progressively replaces physical interactions with virtual isolation.

### 2.2. Identity and Digital Identity

- **Conceptual Definition:** Identity is a dynamic, evolving reality that integrates and matures over time. It is an existential construct containing the structural factors of its own preservation as well as the seeds of its fragmentation. Under the weight of complex educational, social, and cultural shifts, identity remains highly susceptible to distortion and fracture (Mucchielli, 1993: 8). *The Glossary of Social Science Terms* broadens this by defining identity as "the process by which an individual distinguishes himself from others". Alex Mucchielli further specifies it as "a set of indicators that define the subject, rooted in an internal feeling composed of several dimensions: unity, homogeneity, belonging, value, independence, and confidence, all organized around the will to exist" (Boulaouidat, 2015: 49).
- **Virtual Digital Identity:** In virtual spaces, online identity exhibits far greater plasticity than real-world identity. As Robbie Cooper observes, the virtual environment permits fluid alterations in race, status, gender, age, socioeconomic background, and even biological species. It affords individuals a liberated reconstruction of the self, enabling the acquisition of multiple or shared identities within digital worlds that lack rigid behavioral directives or pre-described etiquette (Al-Nadhir, 2020: 63).
- **Operational Definition:** Identity is operationally defined here as a simulated digital persona—a fluid, fragmented, and algorithmically curated self-presentation that internalizes the emergent and consumerist values promoted by TikTok content, often functioning in direct opposition to the user's real-world identity.

### 2.3. The TikTok Application

- **Conceptual Definition:** Globally recognized as TikTok, and known domestically in China as "Douyin," this short-form video platform was developed by the Chinese technology firm ByteDance. It was launched in China in September 2016 and introduced to the international market in 2017. Founded by entrepreneur Zhang Yiming, the platform functions as a specialized social network optimized for the creation, algorithmic distribution, and consumption of short musical and lifestyle video clips (Boufroukh, 2023: 7).
- **Operational Definition:** The TikTok application is operationally defined as the immersive algorithmic space and structural environment hosting short-form digital content produced by "TikTokers". In this study, it represents the primary source of psycho-social stimuli that shapes the affective and cognitive states of followers, yielding short-term behavioral impacts that catalyze digital alienation.

## 3. Literature Review

### 3.1. The Phenomenon of Alienation from a Psychological Perspective

From a psychological standpoint, alienation signifies a fundamental internalization of conflict; the tension between the self and the object shifts from an external social stage to the internal ecosystem of the human psyche. It constitutes a pathological disruption in the individual's relationship with objective reality across various degrees of severity, ranging from mild relational dissonance to profound personality fragmentation. Sigmund Freud approached alienation through the lens of the unconscious, conceptualizing it as the estrangement of the ego (*Ich*) caught between conscious demands and repressed impulses.

Within classical psychoanalytic theory, alienation is often treated as a psychopathological disorder rooted in unresolved developmental conflicts—such as the Oedipus and Electra complexes—and the subsequent suppression of primal drives. Furthermore, Freudian theory emphasizes that alienation is an inevitable byproduct of social civilization; the structural constraints and normative demands of civilized society induce psychological frustration, forcing the individual to suppress their authentic self to gain social acceptance (Al-Naouii, 2019: 321).

Synthesizing these psychological foundations, contemporary literature—heavily drawing upon Melvin Seeman's seminal taxonomy (Seeman, 1959)—operationalizes psychological alienation through five distinctive dimensions:

- **Social Isolation:** This dimension encapsulates an individual's subjective feeling of lacking meaningful, positive relationships. It manifests as an acute sense of loneliness, a deficit in social belonging, and a fragmented self-identity. Within this state, the individual experiences poor engagement with the dominant cultural narrative of their immediate community, feeling disconnected from the collective social fabric.
- **Powerlessness:** This reflects a cognitive and affective perception wherein the individual views themselves as incapable of influencing socio-environmental situations or determining their own destiny. It denotes a perceived lack of control over critical life decisions, a systemic inability to achieve self-fulfillment, and a felt incapacity to introduce meaningful change into one's surroundings.
- **Cognitive Negativity:** This dimension refers to an automatic, pessimistic cognitive bias toward the self, the world, and the future. The individual systematically excludes positive evaluations, distorting current events through a negative lens. This pervasive outlook fosters unpleasant expectations and a bleak anticipation of future outcomes.
- **Meaninglessness:** This involves the individual's overarching perception that existence lacks a cohesive purpose, clarity, or teleological direction. Even when concrete goals are present, the alienated individual experiences a deep-seated inability to internalize or achieve them, leading to operational paralysis within familial, academic, or professional spheres.
- **Cultural Rejection (Value Estrangement):** Characterized by chronic discontent, frustration, and active psychological rebellion, this dimension signifies the individual's rejection of prevailing social values, institutional traditions, and

societal goals. The individual views these norms as alien constructs imposed arbitrarily by the collective other (Al-Attar, 2018: 118).

### 3.2. The Phenomenon of Alienation from a Sociological Perspective

In classical sociology, Durkheim (1893) posits that primitive or pre-industrial societies were defined by a high degree of social homogeneity, fundamentally rooted in the stark similarity of roles and functions performed by individuals. Within this structural framework—which Durkheim terms Mechanical Solidarity—the Collective Conscience (*conscience collective*) operates with a powerful, coercive authority that regulates human behavior and obligates all community members to strictly adhere to established tribal or traditional norms. According to Durkheim, this collective conscience represents the psychical totality of shared beliefs, sentiments, and moral values common to average citizens of the same society, serving as the primary cohesive cement that strengthens social bonds.

However, with the advent of industrialization and technological progress, a profound structural division of labor occurred. Society rapidly transitioned from mechanical simplicity to a complex, highly differentiated state of Organic Solidarity. This rapid transformation, when outpacing normative regulation, triggers a state of anomie (normlessness), culminating in the fragmentation of traditional institutional frameworks and the weakening of interpersonal social cohesion (Al-Naouii, 2019, pp. 322–323).

As macro-sociological structures disintegrate, they manifest at the micro-level through distinct behavioral patterns. Contemporary sociological literature conceptualizes the typologies of socially alienated personalities into three primary operational patterns:

- **The Isolated (Retreatist Typology):** Individuals displaying this pattern systematically withdraw from active social engagement, deliberately avoiding interpersonal confrontations and refusing to fulfill prescriptive social roles. Their social behavior is predominantly characterized by psychological apathy, low motivation, and a pervasive deficit in existential enthusiasm. Perceiving complex social situations as overwhelming and beyond their locus of control, they substitute genuine interaction with alternative, often virtual, cognitive scenarios, demonstrating a fundamental incapacity for constructive conflict resolution.
- **The Compliant (Conformist/Ritualist Typology):** This pattern describes individuals who rigidly obey and conform to group expectations and institutional directives, entirely detached from any personal moral conviction. They operate through flattery, extreme accommodation, and opportunism, chasing social status without genuinely believing in the systemic legitimacy of the hierarchy. Often classified as introversive alienated personalities, their orientation is radically self-centered; they evaluate the world through the strict lens of personal gain, individualistic goals, and subjective experiences. For this typology, the ego—rather than the collective self—constitutes the absolute core of reality and the primary determinant of behavior.
- **The Active (Rebellious Typology):** Unlike the passive alienated types, active individuals directly confront alienating institutional situations with the explicit intent of destabilizing and transforming reality. Manifesting through active

opposition, protest, or systemic rebellion, they are structurally defined as assertive alienated personalities. They harbor an innate resistance to authority structures and a calculated disregard for traditional social regulations. Consequently, their behavior often induces friction within groups, driven by a foundational refusal to cooperate with collective objectives, institutional procedures, or established normative frameworks (Khalil, 2021: 448).

### 3.3. Digital Identity

#### *3.3.1. Characteristics of Virtual Identity*

Within contemporary digital sociology, virtual identity is conceptualized not as a static construct, but as a dynamic, algorithmically mediated self-presentation. The literature identifies several defining characteristics that distinguish identity within virtual ecosystems:

- **Fluidity and Fragmentation:** Virtual identity is inherently protean and ambiguous. In cyberspace, individuals often experience a fragmentation of the self, as their digital presence becomes dispersed across decentralized networks and platforms.
- **Networked Hyper-connectivity:** It is an identity that leverages the structural affordances of the Internet. This enables real-time interaction with alternative digital personas and immediate engagement with diverse local, national, and transnational events.
- **Spatio-Temporal Transcendence:** Characterized by a high degree of structural empowerment, virtual identity seamlessly transcends traditional geopolitical boundaries and restrictive temporal constraints, allowing for ubiquitous global presence.
- **Unprecedented Discursive Freedom:** It operates within an expanded sphere of expressive autonomy. Users exercise an unprecedented liberty to communicate, critique, participate, and manifest their opinions away from physical-world surveillance.
- **Affective Dissonance and Verification Deficits:** Virtual identity is epistemologically difficult to ascertain or verify. Even when a user's real-world identity is formally known, their virtual affective expressions often diverge from their lived, physical-world emotions—though these digital emotions can, under specific immersive conditions, remain subjectively genuine.

*Identity Typologies: Real vs. Simulated Self-Presentation* While real-world identity encompasses the empirical attributes that define an individual in physical life, it is structurally adaptive and can manifest in multiple institutional forms, such as a front identity, a negative identity, or a defensive identity. However, within the virtual sphere—particularly on highly visual, short-form video platforms like TikTok—the most strategic and prevalent modality of self-presentation is the *Front Identity*.

Drawing heavily upon Goffman's (1959) dramaturgical framework of Impression Management, the virtual front identity functions as a curated "front stage" persona. Here, the individual meticulously constructs and projects a digital self that varies significantly from their authentic, offline reality. This calculated manipulation of digital visibility is deployed either as a defensive mechanism to evade social scrutiny and criticism, or as an offensive strategy to accumulate algorithmic validation, social

capital, and peer approval. Depending on the shifting normative demands of the digital subculture being navigated, this front identity can oscillate between a temporary situational mask and a permanent, continuous psychological substitute (Benhas, 2016: 278).

### *3.3.2. Sociological Catalysts for Resorting to Virtual Identities*

On a macro-structural level, the expansion of the transnational digital sphere has catalyzed the emergence of a distinct cosmopolitan digital identity. Within contemporary media sociology, this phenomenon is increasingly linked to the rise of the "Netizen" (the global digital citizen)—a subject characterized by high identity plasticity, complexity, and fluid ambiguity. Transcending traditional geopolitical boundaries, this virtual identity operates autonomously within cyberspace, engaging in continuous intercultural dialogue with global actors from highly disparate backgrounds. These intersecting backgrounds can be classified into a tripartite framework:

1. **Localized Cultural Anchors:** The individual's primary, physical-world national and local identity.
2. **Globalized Virtual Personas:** The individual's simulated, digitally constructed global identity.
3. **Transcultural Trajectories:** The natural socio-cultural orientation from which the virtual citizen transitions toward broader, transnational digital frameworks.

In the contemporary landscape of social media, the TikTok platform has fundamentally disrupted the established digital hierarchy, systematically eclipsing legacy networks such as Facebook, which long dominated the market. TikTok currently represents the fastest-growing mobile ecosystem both globally and within the Algerian context, solidifying its status as the world's primary socio-technical apparatus for short-form audiovisual distribution and algorithmic engagement.

The structural architecture of this application radically democratizes content production, empowering average users to fabricate and broadcast their own short videos instantly. Crucially, the platform's advanced algorithmic affordances—including real-time immersive special effects, augmented reality filters, and automated audio-syncing tools—provide users with the technical means to easily manipulate their digital visibility. This interface significantly lowers the barriers to identity reconstruction, making TikTok the premier incubator for the proliferation of the virtual "front identity" (Boufroukh, 2023: 7).

### *3.3.3. Structural and Psychological Motives for Immersion in Virtual Spaces*

The transition from physical reality to deep immersion within virtual spaces is driven by a complex interplay of systemic "push" factors (offline deficits) and algorithmic "pull" factors (online rewards). Drawing upon contemporary frameworks of Compensatory Internet Use, the structural motives compelling users to detach from their immediate physical environments and submerge into virtual ecosystems can be codified as follows:

- **Domestic Dysfunction and Relational Deficits:** When individuals lack a cohesive, emotionally supportive, and stable family environment, they experience a form of micro-social disorder. The systemic neglect or absence of paternal/maternal

roles—often driven by the economic pressures of modern life or outright family disintegration—induces a state of emotional deprivation. Consequently, individuals turn to virtual environments as a compensatory mechanism to seek alternative baseline structures of validation and belonging.

- **Temporal Anomie and Existential Boredom:** Poor time management or a structural inability to channel human energy into productive social, academic, or professional endeavors often leaves individuals experiencing a profound sense of existential worthlessness. In this state of temporal anomie, the unregulated expanse of free time turns into a psychological burden, prompting individuals to utilize the internet—and short-form video platforms like TikTok—as a primary escape valve to numb cognitive void.
- **Socioeconomic Marginalization and Systemic Alienation:** Unemployment remains one of the most destabilizing macro-social pathologies confronting the modern individual. Prolonged socio-economic exclusion frequently generates a deep-seated resentment toward societal institutions, which are perceived as having failed to provide structural opportunities for self-actualization, financial stability, or ideological expression. To mitigate this systemic paralysis, individuals fabricate alternative virtual realities. In some instances, this alienation drives individuals toward digital deviance, such as constructing fraudulent personas for cyber-deception or financial scams, as a subversive means to bypass real-world economic barriers.
- **Epistemic Curiosity and Algorithmic Seduction:** Cyberspace is a hyper-evolving repository of aesthetic trends, technological innovations, and fluid narratives that continuously stimulate human curiosity. Digital environments operate fundamentally on the principle of sensory attraction. When an individual's intrinsic desire for exploration is captured by the sophisticated, dopamine-driven algorithmic loops of modern applications, deep psychological immersion becomes an inevitable consequence.
- **Simulated Affiliation and Virtual Social Capital:** Social media platforms offer highly accessible avenues for constructing interpersonal relationships that bypass geographical, cultural, and gender boundaries. Although these digital networks are frequently characterized by high relational ambiguity and superficiality, synchronous and asynchronous online interactions (such as live streaming and comment section micro-chatting) remain highly favored by users. These digital spaces simulate a friction-free community, allowing alienated individuals to accumulate virtual social capital and experience a sense of peer solidarity that they lack in their immediate physical proximity (Khalil, 2021: 440).

## 4. Research Methodology

This study adopted a blended digital ethnographic framework (Netnography), which is uniquely optimized for investigating socio-cultural behaviors and psychological constructs across both virtual environments and physical social spaces. This methodological approach prioritizes the systematic observation of digital and real-world communities through immersive participant observation, allowing the researcher to document authentic behaviors, communicative relationships, and affective dimensions that characterize the participants' daily lives.

In alignment with Miles, Huberman, and the foundational anthropological tenets of Geertz (1973), digital ethnography aims to uncover unexpected, latent, and counter-intuitive cultural dynamics through the researcher's prolonged, immersive immersion within the fieldsite. Because the ethnographer serves as the primary instrument for data collection, categorization, and qualitative analysis—relying inherently on contextual narratives, linguistic expressions, and textual nuances rather than statistical metrics—this method yields a "thick description" of the phenomenon under investigation. Methodologically, it synthesizes cyber-spatial observation, physical participant observation, and semi-structured, in-depth qualitative interviews (Khamis, 2023: 812). Implementing this dual-layered ethnographic approach enabled us to trace the holistic lifestyle patterns, shifting social relationships, and emergent values of the participants within their micro-sociological contexts.

### 4.1. Field Site, Sample, and Data Collection Procedures

The empirical fieldwork was carried out using a purposive, multi-layered sampling strategy designed to capture diverse demographic strata within a relatively conservative cultural environment (the Algerian context). The qualitative data collection spanned three consecutive academic terms, leveraging two interconnected ethnographic fieldsites:

- **The Virtual Fieldsite (TikTok):** Tracking the digital footprints, content creation strategies, aesthetic choices (such as filters, music syncs, and dress styles), and interactive micro-chats of the participants on the platform.
- **The Physical Fieldsite (The University of Tebessa & Local Community):** Engaging in real-world participant observation and face-to-face interactions to cross-examine how online personas translate into offline reality.

The participant observation was strategically applied to a primary cohort of female university students at the University of Tebessa. To ensure holistic analytical depth and triangulation, this was supplemented by extensive, semi-structured, in-depth interviews conducted with two additional socio-demographic groups within the local community: adolescent high school students and housewives. Through these sustained ethnographic interactions, we explored the multi-faceted manifestations of psychosocial alienation and the structural friction between digital and real identities.

The qualitative inquiries specifically prompted participants to reconstruct the narratives behind the sources shaping their contemporary dress aesthetics, the transformation of their familial and peer relationships, and the virtual life patterns they actively aspire to internalize in the future.

### 4.2. Study Population and Sampling Strategy

To achieve empirical depth, this ethnographic investigation utilized a dual-layered sampling architecture, systematically triangulating digital media artifacts (content corpus) with physical human informants (field participants).

#### *4.2.1. The Digital Media Corpus (The Virtual Population)*

The virtual population of this study comprises digital micro-communities and algorithmic subcultures generated within the TikTok platform. Specifically, the research targeted short-form audiovisual content categorized under the "Lifestyle" taxonomy. This corpus includes viral videos that curate, perform, and promote specific

consumerist lifestyle paradigms, aesthetic standards, and modern domestic trends. The sampling of these digital artifacts was restricted to content specifically geotargeted at or consumed by Algerian society, with a particular focus on female-centric digital spaces. Women represent the primary demographic target for these lifestyle narratives. Analyzing this corpus allowed the researcher to dissect the structural features, aesthetic components, and psychological stimuli embedded within the simulated digital identities projected by platform creators.

#### *4.2.2. The Human Field Informants (The Physical Sample)*

To evaluate the psychological and social ramifications of this immersive digital consumption, the physical sample was constructed using a purposive, multi-demographic framework within the local Algerian community. This sample was subdivided into three interconnected cohorts to ensure analytical triangulation:

- **Primary Cohort (Participant Observation):** Female undergraduate students enrolled at the University of Tebessa, observed across their natural academic environment to track the overt internalization of digital lifestyle trends.
- **Secondary Cohort (In-depth Interviews):** Adolescent high school students, interviewed to assess identity vulnerability and cognitive peer-alignment.
- **Tertiary Cohort (In-depth Interviews):** Housewives, interviewed to evaluate how virtual lifestyle standards disrupt or destabilize traditional domestic expectations and familial roles.

#### *4.2.3. Selection Protocol: Participant-Driven Sampling*

In strict adherence to ethnographic neutrality, no specific TikTok content creators or influencer profiles were pre-selected by the researcher. Instead, a participant-driven sampling strategy (akin to digital snowballing) was deployed. The female university students acted as cultural guides; through their everyday narratives and shared digital routines, they organically directed the researcher toward the specific digital creators, trending hashtags, and algorithmic feeds that they—and their peer groups—personally follow and emotionally engage with. This protocol guaranteed that the analyzed digital corpus directly reflects the authentic consumption patterns of the community under study, rather than an artificial selection imposed by the researcher.

## 5. Conclusion and Recommendations

This mixed digital ethnographic study investigated the micro-sociological and psychological impacts of short-form “Lifestyle” content on TikTok among a multi-demographic cohort of Algerian female followers (university students, adolescents, and housewives) in Tebessa. By analyzing the structural friction between virtual self-presentation and localized cultural anchors, the research yielded several critical conclusions that advance our understanding of contemporary digital psychosocial alienation.

### 5.1. Key Empirical Findings

- **The Normalization of Reality Rejection:** Immersive consumption of algorithmically curated lifestyle narratives systematically fosters a profound non-acceptance of immediate economic and material realities. The structural disparity between the hyper-real, affluent lifestyles promoted by content creators and the

concrete socioeconomic conditions of the followers creates functional barriers to self-actualization, catalyzing chronic existential dissatisfaction.

- **Domestic Destabilization and Marital Regret:** The ethnographic interviews revealed acute relational friction within the domestic sphere. Several married informants expressed profound regret regarding their early marital choices, viewing them as structural impediments to achieving the idealized, autonomous, and consumerist lifestyles marketed on digital platforms. This manifests as anomic marital dissatisfaction and a perceived loss of life opportunities.
- **Acute Identity Shock and Disorientation:** Followers experience a persistent cycle of socio-cognitive disorientation. They temporarily inhabit a simulated persona through subjective immersion in TikTok videos, only to be abruptly shocked by the return to physical reality. This chronic oscillation between a desired virtual life and an unaccepted physical existence impedes the formation of a cohesive self-identity.
- **The Erosion of Core Socio-Cultural Values:** TikTok's structural narratives actively promote individualistic, hyper-consumerist paradigms—such as absolute female autonomy, material acquisition (cars and luxury estates), and the prioritization of economic individualism—while systematically marginalizing traditional family structures and marriage as secondary or obsolete. Within a relatively conservative social fabric, these algorithmic narratives act as counter-cultural forces that strain traditional social cohesion.
- **The Proliferation of Hedonistic Dependency:** The analyzed digital corpus predominantly champions conspicuous consumption, luxury leisure, and aesthetic indulgence without providing functional frameworks for labor, formal education, or cultural enrichment. Consequently, this algorithmic seduction produces a "hollowed-out" individualistic subject—characterized by psychological emptiness, a deficit in social responsibility, and an intense expectation of comfort without physical or cognitive effort.
- **The Emergence of Alienated Role-Modeling:** By internalizing virtual celebrities and TikTok influencers as behavioral and aesthetic benchmarks, users adopt a fluid digital identity that directly collides with the normative expectations of their physical community. This unresolvable tension culminates in what contemporary sociology defines as psychosocial alienation, rendering the unintegrated individual a destabilizing structural burden on society.

### 5.2. Concluding Remarks and Policy Imperatives

In conclusion, this research highlights how the structural and visual affordances of the TikTok application systematically transcend passive entertainment, functioning instead as a powerful psychological apparatus that re-engineers the cognitive, affective, and behavioral frameworks of its followers. The resulting state of psychological non-belonging and social disorientation constitutes a critical modern pathology that threatens the stability of traditional institutional frameworks.

Consequently, these findings necessitate an immediate, strategic intervention from primary socialization institutions (families, educational facilities, religious institutions, and formal media bodies). It is imperative that these foundational

institutions reclaim their structural roles, update their discursive strategies to counter the algorithmic allure of transnational networks, and provide grounded psychological support mechanisms. Reclaiming the digital citizen from this state of alienation remains a vital prerequisite for preserving collective social well-being in the hyper-digital age.

**References:**


1. Al-Attar, H. M. (2018). Social media use and its relationship with psychological alienation and quality of life among Faculty of Education students. *Journal of the Faculty of Education*, 23(3), 115–140.
2. Al-Nadhir, M. (2020). Epistemology of media development: An approach to the interactive interpretation of new media models—virtual identity as a model. *Journal of Communication in Human and Social Sciences*, 14(2), 55–72.
3. Al-Naouii, A. (2019). The phenomenon of alienation between epistemological analysis and sociological analysis. *Al-Wahat Journal for Research and Studies*, 12(1), 315–335.
4. Benhas, S. A. (2016). From real identity to virtual identity. *Al-Insaniyya Journal for Research and Studies*, 7(1), 270–290.
5. Boufroukh, F. (2023). Social media networks and their risks to the values and privacy of Algerian children and adolescents: A psycho-sociological reading of TikTok videos. *The International Journal of Social Communication*, (4), 1–22.
6. Boulaouidat, H. (2015). An intellectual approach to the dualism of the internet and identity. *Journal of Human and Social Sciences*, 11(3), 40–58.
7. Durkheim, É. (1893). *The division of labour in society*. London: Free Press.
8. Geertz, C. (1973). *The interpretation of cultures: Selected essays*. New York: Basic Books.
9. Goffman, E. (1959). *The presentation of self in everyday life*. New York: Anchor Books.
10. Khalil, N. (2021). The role of the virtual world in spreading manifestations of social alienation through social networking sites. *The Researcher in Human and Social Sciences Journal*, 13(2), 435–455.
11. Khamis, H. (2023). The ethnographic method and its uses in anthropological research. *Journal of Human and Social Sciences*, 9(2), 805–825.
12. Khious, R. (2022). *Addiction to social media use and its relationship with social alienation among university students* (Unpublished doctoral dissertation). University of Ghardaia, Algeria.
13. Mucchielli, A. (1993). *Identity*. Tonneins: Dar Al-Waseem for Printing Services.
14. Saidi, K. (2011). The reality of the new communicative context between the electronic self and virtual identity: A reading of dimensions and concepts. *Bibliophilia Journal for Library and Information Studies*, 10(3), 165–185.
15. Seeman, M. (1959). On the meaning of alienation. *American Sociological Review*, 24(6), 783–791.

# Bookclubs: The Emerging Phenomenon, an Alternative to Social Media, with Untapped Potential

**Lorena ȚĂRUȘ**
PhD, Alexandru Ioan Cuza University of Iași (Romania)
Email: lorena.tarus@gmail.com

***Abstract***: *This article explores bookclubs as an emergent community phenomenon and a potential alternative to social-media-mediated interaction in contemporary Romania. Situated in a context marked by overlapping crises and low cultural and reading indicators, the paper focuses on the recent rise of book clubs in Iași and asks whether they can be understood as emergent community spaces and as a possible counterweight to algorithmically shaped online sociability. The paper is placed at the intersection of sociology of community, digital sociology and the sociology of culture, revisiting the evolution from territorial to interest-based communities, the development of virtual and hybrid communities, and narrative and practice-based approaches to community. Methodologically, the text is a theoretically driven essay informed by a selective literature review and by exploratory, auto-ethnographic observations drawn from participation in a feminist bookclub over the course of one year. The analysis suggests that reading clubs operate as communities of interest and practice around books, providing slow time, face-to-face dialogue and a sense of belonging that contrasts with fast, "snackable" and often anxiety-inducing social media interaction. The paper argues that, although still under-researched and insufficiently valorised, book clubs have the potential to contribute to mental wellbeing, to reduce loneliness and to support local social capital, and therefore deserve to be integrated into broader cultural and educational strategies.*

***Keywords:*** *bookclubs; community; social media; hybrid sociability; reading community*

## 1. Introduction

The challenges of recent years (the pandemic, war, economic crisis, the explosion of AI) have led to some of the most diverse and unexpected social adaptations and reorganizations. Some have emerged as clear reactions to societal triggers, others as anchors of resistance in an increasingly uncertain and insecure world. While some of these anchors are strictly tied to safety and to securing resources for a backup plan that each person imagines according to their personal and family universe, other means of resilience to everything brought by the present seek to "nourish" the mind and its health.

In a context in which most barometers of book consumption and cultural consumption place the Romanian space at the bottom of the rankings, a phenomenon is taking shape that contradicts the statistics, apparently on the rise, which may in fact either signify resistance to all the austerity measures taken by the authorities, or a positive signal that can be interpreted as a response to snack-type content on social media and to the algorithms of social platforms.

This article aims to highlight the emerging phenomenon of book clubs, the importance of belonging to a community with a common interest – reading the same book – as a growing and consolidating alternative to the online environment. The research question I set out to answer is: "Can the book clubs in Iași be perceived as

emerging community spaces and a potential alternative to social-media-based relationships in a hyperconnected society?"

## 2. From Territorial Community to Community of Interests

In classical sociology, the idea of community has been closely linked to territorial proximity, the stability of social relations, and the existence of a shared set of norms, values, and everyday practices. A large part of the sociological tradition has operated with the distinction between community and society, in which community was understood as a form of social life based on closeness, cohesion, and organic belonging, while society designated more impersonal, contractual, and functional relationships. Specialized literature shows, however, that this classic opposition can no longer be maintained in a rigid form, since the processes of modernity have complicated both the structure of social relations and the actual content of community. In this sense, the evolution of the concept of community indicates a shift from a definition centered exclusively on territory to a more flexible one, which includes symbolic, identity-based, and relational forms of belonging (Schifirneț, 2003). In this sense, in 1973, the American sociologist David B. Clark considered that the unity of a community is not given by geographic space and joint functioning, but by the psychological elements that bind individuals, such as solidarity, security, cohesion (Zubenschi, 2023).

In today's society, the concept of community receives contemporary interpretations that are at a significant distance from the "idea of place as the essential criterion of construction" (Hâncean, 2018). The current reinterpretation of community thus starts from the reality that belonging is no longer produced only by spatial co-presence, but also by participation in shared practices, interests, and narratives. A recent text on defining community in the digital age even proposes understanding it as a group of people who share an identity-shaping narrative, that is, a common story about who they are, what values they share, and why they choose to stay together (Patskanick, 2026). Such an approach is important because it shifts the focus from community as a geographic given to community as a relational and symbolic process, constructed through participation and mutual recognition. In the same direction, works on the digital revolution and the transformation of social ties show that new forms of community are increasingly organized around common interests, goals, and practices, even when members do not share the same physical space (Taylor and Machado, 2025).

This conceptual evolution does not mean the disappearance of territorial community, but rather its coexistence with new forms of belonging. Community continues to have an important spatial component, especially in local and urban contexts, but it is complemented by communities of interest, practice, or affinity, which operate on the basis of a reflexive choice. In this framework, community is no longer exclusively something inherited, but also something sought, cultivated, and socially desirable. The literature on virtual communities and digital anthropology supports precisely this idea: in contemporary societies, individuals simultaneously participate in several types of communities, some locally anchored, others configured through networks, interests, and technologically mediated interactions (Costina, 2012). Therefore, the concept of community must be extended so as to include both the dimension of place and the dimension of shared meaning.

From this perspective, the shift from territorial community to community of interests can be read as one of the essential sociological transformations of the present. If in classical forms community was supported by neighborhood, continuity, and dense relations of mutual acquaintance, today it can also be produced by the regular gathering around a shared practice, a cultural concern, or a common value. That is precisely why contemporary communities should not be understood as weak or derivative forms of the "true" community, but as reconfigurations suited to a mobile, digitalized, and pluralized society. In analytical terms, the community of interests becomes one of the central figures of current sociability, because it offers individuals a sense of belonging, symbolic continuity, and mutual recognition in a social context marked by fragmentation and hyperconnectivity (Păușan, 2022). In this sense, we can analyze reading clubs not only as simple informal groups, but as emerging forms of community built around a shared cultural practice. If in the first part we have traced how community gradually detaches from a strict attachment to territory, we are now interested in how digital media have accelerated this shift, giving rise to virtual and hybrid communities that are also relevant for the way reading clubs function.

### 3. Virtual and Hybrid Communities in the Digital Age: From Offline to Online and from Online to Hybrid

In the last two decades, the development of the Internet and digital media has not only produced new channels of communication, but also new forms of community that transcend the constraints of territorial proximity. Digital sociology (Fussey and Roth, 2020) describes the emergence of online communities and virtual worlds in which individuals connect around interests, practices, or identities, forming stable networks of interaction and solidarity. These virtual communities are not perceived by participants as "less real" relationships, but as authentic spaces of belonging, meaning negotiation, and redefinition of social roles. Studies emphasize that as more and more activities move online, digital communities become an integrated component of everyday life, influencing both the way individuals perceive themselves and the way they relate to local offline communities.

Studies on virtual communities in education show, for example, how online groups built around a discipline, a platform, or a course can evolve from simple discussion spaces into genuine communities of values in which participants develop norms, rituals, and a strong sense of "we." From a psychosociological perspective, such communities reproduce the classic characteristics of the sense of community – belonging, mutual influence, need fulfillment, and emotional connection – but do so in a technologically mediated environment. Even if interaction takes place through screens, what is being constructed is a stable framework of relationships and symbolic recognition, which can compete with or complement traditional communities (Grădinaru, 2013).

Recent literature, however, proposes that we look beyond the simple opposition between "online" and "offline" and speak of hybrid communities, in which the boundary between physical and digital space becomes porous. Some studies show that networks built in digital environments continue and are reconfigured in face-to-face meetings, study visits, conferences, and joint projects, so that community belonging is distributed between online platforms and local contexts. Similarly, analyses of virtual worlds highlight the fact that interactions between avatars have direct effects on how participants reorganize their relationships, values, and

expectations in everyday life. Therefore, hybrid communities cannot be reduced either to "digital communities" or to "neighborhood communities," but must be understood as complex ecologies of ties that constantly traverse online and offline.

These transformations have been accelerated by the shift to hybrid work and learning models, especially after the COVID-19 pandemic, when collaboration platforms became everyday infrastructures of socialization. Recent studies (Făt, 2025) show that tools initially designed for professional communication began to function as spaces for socialization and community, going beyond the business framework and becoming places where people maintain relationships, share experiences, and build a collective identity. In the same direction, university courses and projects focused on digital pedagogy describe the emergence of "collaborative virtual spaces" in which groups of pupils and students develop learning communities that extend into offline life. From these perspectives, hybrid communities represent one of the dominant configurations of contemporary sociability, and many recent cultural practices – including reading clubs – can be read as forms of community that are organized simultaneously in physical and digital space.

Beyond the environment in which they manifest – physical, virtual, or hybrid – the essential question remains what exactly binds together the members of a community. This core of meaning is captured by narrative perspectives on community, which emphasize shared stories and narratives.

**4. Community as Shared Narrative and Identity**

In contemporary sociology of community, the idea has gained ground that community bonds are built around shared narratives through which members tell themselves who "we" are, what values they hold, and how they differ from "others". A recent study (Asay and Cope, 2026) on community as "story" shows that community identity is articulated in a set of recurring stories about place, history, and relationships, and that these stories function simultaneously as a mirror of the community and as a guide for the individual identity of its members. From this perspective, community is not only a network of interactions, but also a narrative space in which common representations of "who we are" and "what matters to us" are constructed and negotiated. Studies on "community narration" in community psychology (Olson and Jason, 2011) support the same idea: communities can be understood as ensembles of collective narratives, in which the personal stories of members are woven into a common "red thread" that gives meaning and coherence to disparate experiences.

Narrative approaches to community identity are also influenced by philosophical and sociological works on narrative identity. Research dedicated to the role of narrative identity in community and participation shows that people understand their own "self" through the stories they tell about themselves, and that participation in community life precisely involves integrating these personal histories into a broader, shared narrative framework. Discourse analyses of group identity in turn show that narratives do not simply describe reality, but construct it: through the way actions, relationships, and traits are told, narrators create a "story world" in which certain factors become central to collective definition ("we are the ones who…", "in our community, one does/does not do…"). In this framework, community identity is the result of continuous narrative work, not a fixed given (Hyland, 2018).

An important contribution to this line of thought comes from the literature on "imagined communities", particularly in the context of nationalism. Anderson (1983) shows that nations do not exist only as institutional structures, but as "imagined communities" in which members, although they will never all meet each other, nevertheless imagine a shared communion based on shared stories, rituals, and symbols. Beyond the case of nations, this perspective has been taken up to understand various forms of cultural or interest-based communities, in which collective narratives (about origin, values, shared trajectories) play a central role in producing the sense of belonging. Recent research on social capital and shared narratives shows that "shared narratives" function as a mechanism for constructing common values, attitudes, and goals, creating a similar interpretive framework for events and facilitating collective action (Claridge, 2024).

The sociology and community psychology literature has synthesized these contributions into theories of the "sense of community", in which the narrative dimension is essential. The classic McMillan and Chavis (1986) model defines the sense of community through belonging, influence, need fulfillment, and emotional connection, and later developments emphasize that these dimensions coalesce over time into a shared history, a "story" of the group, symbolized by events, rituals, and forms of collective "art". Studies on "community narration" show that the difference between personal stories and community narratives is one of level, not of nature: individual stories are the "bricks" from which shared narratives are built, and shared narratives, in turn, provide a vocabulary and a framework of meaning for individual experiences. In this sense, community as shared narrative and identity is not a metaphor, but a description of the concrete way in which groups organize their memory, values, and projects through the stories they repeat, celebrate, or, on the contrary, contest together (Olson and Jason, 2011).

If shared narratives describe the symbolic dimension of community, communities of interest and practice emphasize what people actually do together. In the Romanian context, these two dimensions meet concretely around activities such as reading, volunteering, or collaborative learning.

## 5. Communities of Interest and Practice in the Romanian Context

In the Romanian context, the notion of community is increasingly discussed in terms of "communities of interest" and "communities of practice", that is groups formed around a common interest or shared activity, not just around a territory. Recent studies that investigate the community of interest in relation to emerging technologies show that such groups are formed around topics or concerns (from technological innovation to environment or culture), develop internal rules, modes of cooperation, and a certain type of solidarity, without depending on a particular spatial neighborhood. In such communities, what matters most is what people do together and the meaning they attribute to the shared activity, rather than the fact that they live in the same neighborhood or city.

The literature on communities of practice describes groups that are constituted around a practice – professional, educational, or cultural – and within which members learn from one another, refine their repertoires of action, and build their identity in relation to that field (Claridge, 2024). A recent thesis on online communities of practice for European students (Păușan, 2022) shows how such communities develop over time rituals, informal roles, norms of participation, and mechanisms of mutual support,

making the transition from simple discussion groups to stable communities of learning and belonging. Although the case analyzed is educational and transnational, the logic is transferable: wherever there is a shared practice – from research to art or reading – communities of practice can emerge that combine a functional dimension (doing something together) with an identity dimension (being "one of us" in that community).

In the Romanian context, such communities of interest and practice are found not only in the professional or educational sphere, but also in the cultural, civic, or leisure area. Initiatives such as reading clubs, film discussion groups, or recurring creative workshops can be read as concrete forms of cultural communities of practice, in which people not only consume culture, but interpret it together and turn it into a pretext for socializing. The European report on teaching reading emphasizes, moreover, the importance of extra-school contexts and non-formal reading environments – clubs, reading circles, local groups – in the formation of a "culture of reading" and in strengthening the motivation to read, especially among young people. At the same time, research on urban social life in Romania shows that such thematic groups can function as community nuclei in a fragmented urban environment, offering participants a sense of continuity, recognition, and belonging (European Commission, 2011).

Against this background, reading clubs can be interpreted as communities of interest and practice around the book: people who gather repeatedly to read the same text, to discuss, and to jointly produce interpretations, implicit rules, and forms of sociability. They take over the logic of communities of practice (learning, exchanging perspectives, developing a "style" of talking about books) and the logic of communities of interest (a stable core defined by the interest in reading), thereby placing themselves at the center of the apparently growing cultural phenomenon of book clubs in Romanian cities. In Iași, the existence of several reading clubs – organized by libraries, bookstores, NGOs, or informal groups – suggests that reading becomes, beyond an individual act, a social practice that generates community (Mediafax, 2026). This interpretation prepares the ground for analyzing the phenomenon as an emerging trend: in a context marked by low cultural consumption and the pressure of social media, book clubs appear as forms of community that revalue reading, face-to-face relationships, and belonging to a "we" built around the same book (Cărturești, 2026).

These forms of community do not emerge in a vacuum, however, but coexist and compete with the spaces of socialization and content consumption created by digital social platforms, which structure a large part of Romanians' everyday experience.

### 6. Conclusions: Bookclubs – an Alternative to Online Hyperconnection

In contemporary society, social media and online social platforms occupy a dominant space for relationships and content consumption. Studies in media and sociology show that Romania is among the top countries with the highest use of social media: Facebook, Instagram, TikTok, and more recently YouTube are dominant platforms (Manafu, 2023). In a recent study, it is shown that Facebook remains the leading social network in Romania, with over 12.3 million users, an increase of 1.2 million compared to 2023, and that TikTok is becoming increasingly popular among young people, surpassing Instagram in some rural areas. In addition, the consumption of "snack"-type content – short video, fast content, personalized algorithms – is becoming predominant, instead of deep content or reading (DataReportal, 2026).

In this context, sociologists and social psychologists have observed a phenomenon of digital exhaustion and emotional exhaustion – a dependence on the feed, notifications, and scrolling that leads to anxiety, loneliness, and wasted time. A study published in the Journal of Social and Personal Relationships shows that social media algorithms can intensify feelings of loneliness, as they are personalized and optimized to keep users on the platform rather than to promote authentic relationships (Hardman and Choi, 2023). The evolution of algorithms and social platforms (Facebook, Instagram, TikTok, etc.) in 2025 shows that manipulation of content and algorithmic bias can influence beliefs, perceptions of loneliness, and trust relationships.

Thus, in a hyperconnected and digital society in which Romania is at the bottom of the rankings for cultural consumption and reading, social media, although it is an online space for relationships, is in fact a space of fast, superficial, and anxious consumption. By contrast, although there are no studies or figures to reflect the size of this growing phenomenon, reading clubs are becoming an alternative space, for relationship-building without algorithms, for authentic socializing, and for breathing space from digital frenzy. While online content is becoming increasingly "snackable" and while Romanians apparently read less and less, we are discovering in many cities not just one, but several bookclubs that people join, where they come with the book read or at least started, discuss, debate, and feel that they belong to a group that takes them out of continuous scrolling on screens. Reading clubs are thus perceived as "offline" and "time-out" spaces away from the screen, offering authentic relationships and community solidarity.

Bookclubs, cultural events, and community development projects therefore become a source of increased reading and cultural revitalization. In this context, they become a form of relationship-building, identity, and belonging to a group of readers. Especially for young people, reading clubs become "lifestyle" – an identity marker of an "active reader", "wise", "participatory", and "interested in culture and personal development".

From an exploratory perspective, without having concrete data, reading clubs in IaşI can be understood as emerging phenomena of community space, relationship-building, solidarity, and belonging in an urban and hyperconnected society. They represent a form of resistance to "snack"-type content and social media algorithms, which promote fast, superficial, and anxious relationships.

From the perspective of a person who has been participating monthly for almost a year in a feminist book club, I can appreciate the fact that, especially until the group becomes cohesive, a "safe" space is created in which everyone feels they can express their opinion without others rejecting it, but rather receiving and accepting it as another angle from which to approach an aspect. In general, discussions start from the book but move deeply into everyday challenges, with meetings sometimes extending to 5–6 hours each. Since the participants have different professions and occupations and come from different backgrounds, at each meeting there is a multitude of opinions, and I consider that this strongly counterbalances the chaos and hate or absolute truths found in social media comments. In the case of people who work from home or single mothers, the book club space represents a necessary escape from the everyday routine, very useful for their mental health. Following the meetings, micro-

groups have been created based on other shared interests, and relationships of friendship and joint activities in the community have developed.

Following the review of the consulted bibliography, as well as my own experience and other experiences shared by people who attend bookclubs, the idea emerges that the bookclub phenomenon currently holds development potential that is insufficiently exploited. If they were systematically supported and promoted by institutional actors (libraries, schools, universities, bookstores, NGOs), these initiatives could bring together vibrant, growing communities of readers who would counterbalance the downward trends in cultural consumption.

At the same time, reading clubs can be interpreted as emerging community spaces and as a potential alternative to social-media-based relationships in a hyperconnected society that is often experienced as oppressive. Beyond their cultural role, they seem to fulfill functions of mental hygiene, reduction of loneliness, and strengthening of local social capital, which gives them a broader social relevance than the simple promotion of reading.

In this sense, an in-depth empirical exploration of the phenomenon – through interviews with moderators and participants, as well as through quantitative research at local and regional levels – becomes a necessary direction for understanding the extent to which these communities of readers can be integrated into current cultural and educational policies.

**References**

1. Anderson, B. (1983). Imagined Communities: Reflections on the Origin and Spread of Nationalism. London: Verso.
2. Asay, G., and Cope, M. (2026). Community as Story: Identity, Place, and Narrative in San Juan County, Utah, USA. Available at: https://onlinelibrary.wiley.com/doi/10.1111/ruso.70045
3. Claridge, T. (2024). Shared Narratives. In Social Capital in Practice. Available at: https://www.socialcapitalresearch.com/explore-social-capital/predispositions/shared-narratives/
4. Costina, A. (2012). Antropologia digitală şi societăţile virtuale. Studiu interdisciplinar privind antropologia reţelelor informaţionale. Available at: https://doctorat.ubbcluj.ro/sustinerea_publica/rezumate/2012/sociologie/Costina_Andrei_Ro.pdf
5. De Domenico, M., and Artime, O. (n.d.). From the Origin of Life to Pandemics: Emergent Phenomena in Complex Systems. Available at: https://ar5iv.labs.arxiv.org/html/2205.11595
6. Dolan, E. (2024). Study Explores Link Between Social Media Algorithms and Loneliness. Available at: https://www.psypost.org/study-explores-link-between-social-media-algorithms-and-loneliness/
7. Făt, S. (2025). Pedagogie digitală. Suport de curs – formare EDIS PED. Available at: https://pedagogie-digitala.ro/edis-ped/Unibuc_Pedagogie_digitala_suport_curs_20250121.pdf
8. Fussey, P., and Roth, S. (2020). Digitizing Sociology: Continuity and Change in the Internet Era. Available at: https://journals.sagepub.com/doi/full/10.1177/0038038520918562
9. Grădinaru, C. (2013). Transformarea comunităţilor ştiinţifice în era digitală. Available at: https://anale.fssp.uaic.ro/index.php/stiintealecomunicarii

10. Hardman, S., and Choi, M. (2023). Lonely Algorithms: A Longitudinal Investigation into the Bidirectional Relationship Between Algorithm Responsiveness and Loneliness. Available at: https://journals.sagepub.com/doi/abs/10.1177/02654075231156623
11. Hâncean, M.-G. (ed.). (2018). Reţelele sociale în era Facebook. Iasi: Polirom.
12. Hyland, K. (2018). Narrative, Identity and Academic Storytelling. Available at: https://iuuk.mff.cuni.cz/~andrew/EAP/ilcea-4677.pdf
13. Manafu, C. (2023). Care sunt reţelele sociale preferate ale românilor. Available at: https://www.manafu.ro/2023/02/care-sunt-retelele-sociale-preferate-ale-romanilor/
14. McMillan, D. W., and Chavis, D. M. (1986). Sense of Community: A Definition and Theory. Journal of Community Psychology, 14(1), 6–23.
15. Olson, B., and Jason, L. (2011). The Community Narration (CN) Approach: Understanding a Group's Identity and Cognitive Constructs Through Personal and Community Narratives. Available at: https://pmc.ncbi.nlm.nih.gov/articles/PMC3821795/
16. Otovescu, D. (2017). Sociologia culturii româneşti. Craiova: Editura Scrisul Românesc. Available at: https://amtap.md/wp-content/uploads/2020/04/2017_otovescu_sociologia_culturii.pdf
17. Patskanick, T. (2026). Defining "Community" in the Digital Age. Available at: https://agelab.mit.edu/blog/defining-community-digital-age
18. Păuşan, A. (2022). Comunităţi de practică online pentru studenţi europeni. Available at: https://doctorat.snspa.ro/wp-content/uploads/2022/05/Rezumat-teza-Andreea-Pausan-RO.pdf
19. Sandu, D. (ed.). (2006). Viaţa socială în România urbană. Iasi: Polirom.
20. Schifirneţ, C. (2003). Sociologie. Available at: http://elibrary.snspa.ro/wp-content/uploads/2020/04/Sociologie.pdf
21. Servaes, J. (2025). The Impact of the Digital Revolution on Culture and Communication. Available at: https://indepthnews.net/the-impact-of-the-digital-revolution-on-culture-and-communication/
22. Stan, A. (2017). Fascinaţia fenomenelor emergente şi naşterea comportamentului colectiv. Available at: https://www.contributors.ro/fascina%C8%9Bia-fenomenelor-emergente-%C8%99i-na%C8%99terea-comportamentului-colectiv/
23. Taylor, S., and Machado, H. (2025). The Reconfiguration of Social Bonds in the Digital Age: Virtual Connections vs. Face-to-Face Relationships. Available at: https://www.sciepublish.com/article/pii/420
24. Zubenschi, E. (2023). Community in Sociological Vision. Available at: https://ibn.idsi.md/sites/default/files/imag_file/297-304_11.pdf
25. *** Cărtureşti. (2026). Cluburi de lectură. Available at: https://miscareapentrulectura.ro/cluburi-de-lectura/
26. *** DataReportal. (2026). Digital 2026: Romania. Available at: https://datareportal.com/reports/digital-2026-romania
27. *** European Commission. (2011). Predarea citirii în Europa: Contexte, politici şi practici. Available at: https://nou.siphd.ro/doc/resurse_virtuale/resurse002.pdf
28. *** Gen Z Lifestyle. (n.d.). Cum a devenit clubul de lectură mai cool decât Fratelli într-o ţară care este la coada Europei ca şi cărţi citite: Aveam nevoie de un alt fel de

deadline. Available at: https://www.zf.ro/zf-gen-z/gen-z-lifestyle-cum-a-devenit-clubul-de-lectura-mai-cool-decat-22517036
29. *** Mediafax. (2026). România de azi, citită printre rânduri: ce arată cărțile anului 2025 despre noile priorități ale românilor. 5 din 10 titluri din topul general sunt dedicate sănătății, echilibrului emoțional și wellbeing-ului. Available at: https://comunicate.mediafax.biz/Pages/Public/Comunicate.aspx?comunicatId=21580
30. *** Socializarea în lumea virtuală. Magia algoritmilor. (2024). Available at: https://intelligence.sri.ro/socializarea-lumea-virtuala-magia-algoritmilor/
31. *** Stilul de muncă hibrid a transformat platformele de comunicare business în spații preferate de socializare online. (2023). Available at: https://blog.eset.ro/aplicatii/stilul-de-munca-hibrid-a-transformat-platformele-de-comunicare-business-in-spatii-preferate-de-socializare-online/

# Violence Associated with Armed Conflicts: The Algerian Experience

**Atika OUKIL**
Laboratory of Education, Delinquency and Crime in Society,
Badji Mokhtar Annaba University (Algeria)
Email: atika.oukil@univ-annaba.dz

***Abstract:*** *This article examines conflict-related sexual violence during Algeria's Black Decade and its long-term effects on women survivors and children born of rape. Situated within peace and conflict studies, the sociology of violence, and transitional justice, the study uses a qualitative case-study approach based on theoretical analysis and documentary review. It combines Galtung's concept of structural violence, Goffman's theory of stigma, and Foucault's notion of biopolitical governance to interpret the interaction among patriarchal norms, institutional recognition, legal regulation, and social exclusion. The analysis shows that sexual violence operated not only as direct physical aggression but also as a mechanism of symbolic domination whose effects persisted after hostilities ended. Survivors faced community rejection, evidentiary barriers, limited psychosocial support, and restrictive legal responses, while "mountain children" experienced civil-status uncertainty, identity-related stigma, and obstacles to social integration. Although the Charter for Peace and National Reconciliation contributed to ending organized violence, it did not fully address these structural and intergenerational consequences. The article concludes that durable post-conflict recovery requires survivor-centered policies combining legal recognition, psychosocial care, restorative justice, civil registration, and sustained reintegration measures capable of dismantling stigma and preventing the reproduction of marginalization.*

***Keywords:*** *sexual violence; armed conflict; social stigma; social reintegration; Algeria*

## 1. Introduction

Armed conflicts constitute social spaces in which violence is structurally reproduced and social relations are forcibly reconfigured. Children, in this disrupted social order, emerge as one of the most vulnerable groups. War is not merely a military confrontation between opposing forces; it reshapes social roles and incorporates children into coercive functions, whether through recruitment as combatants, exploitation in hazardous labor, or exposure to destructive living environments that intensify psychological and health-related vulnerabilities. According to UNICEF (2024), more than 473 million children—approximately one in six worldwide—live in conflict-affected areas, while the number of forcibly displaced children reached 47.2 million by the end of 2023. These figures indicate that childhood in conflict settings becomes a structurally endangered condition, marked by intersecting forms of deprivation, including limited access to education, healthcare, and adequate nutrition, alongside heightened risks of death, injury, and displacement.

Within this framework, sexual violence must be understood sociologically not as an isolated criminal act but as a symbolic and strategic practice targeting the body as a carrier of collective identity. In civil wars, women's bodies are often constructed as symbolic boundaries of the community, and rape becomes a weapon of psychological warfare aimed at humiliating the enemy, undermining morale, and fracturing social cohesion. Systematic rape thus functions as a mechanism for

producing stigma, reshaping demographic realities, and destabilizing the moral and cultural foundations of targeted groups. The children born of such violence frequently inherit a double burden: they embody the trauma inflicted upon their mothers and are socially perceived as extensions of the "enemy," exposing them to exclusion, discrimination, and identity-based marginalization.

The Algerian experience during the so-called "Black Decade" of the 1990s illustrates this dynamic. Armed violence was accompanied by cases of abduction, captivity, and sexual assault within territories controlled by armed groups, resulting in the birth of what became known as the "mountain children." These children were often discovered in precarious health and social conditions and transferred to state institutions. However, the challenge was not merely administrative but profoundly sociological. Mothers faced severe psychological trauma and social stigma, while many of these children experienced legal invisibility due to the absence of civil status documentation, which in turn restricted their access to education and social integration.

Although the Charter for Peace and National Reconciliation (2005) marked a significant political step toward ending armed violence and restoring national stability, the long-term social consequences affecting this category were not fully resolved. Reintegration, from a sociological standpoint, requires more than the cessation of armed confrontation; it demands the dismantling of stigma, the reconstruction of social bonds, and sustained institutional and psychosocial support. The structural neglect of such vulnerable groups risks reproducing marginalization, particularly in contexts where unresolved trauma and exclusion may create conditions conducive to renewed radicalization.

This article therefore seeks to examine the Algerian experience in addressing the social remnants of the Black Decade, focusing on the status of women victims of violence, societal acceptance and stigma, mechanisms of social and legal care, and policies aimed at supporting and integrating the "mountain children" following the implementation of national reconciliation.

To move beyond descriptive accounts of wartime abuses, this study adopts a multi-layered sociological framework that conceptualizes conflict-related sexual violence as an integrated structural and symbolic mechanism embedded within broader systems of power and control. Rather than treating rape as an isolated act of brutality, this phenomenon is situated at the intersection of three primary dimensions:

1. Patriarchal and societal structures, which reproduce gendered inequalities and hierarchical power relations;

2. Institutional and legal governance, where the state determines who is recognized as a victim and who remains legally invisible, thereby perpetuating structural violence beyond the cessation of armed conflict;

3. Social and cultural stigma, which transforms survivors and their children into carriers of shame, reproducing exclusion across generations.

In this way, sexual violence is understood not as an episodic individual crime but as a strategic practice that reshapes social identities, redraws symbolic boundaries within the community, and perpetuates social exclusion and marginalization long after the armed confrontation has ended.

## 2. Importance of the Topic

The importance of this study lies in its contribution to understanding the sociological dimensions of violence in internal conflicts and in highlighting the need for comprehensive counterterrorism approaches that extend beyond security measures to encompass social reconstruction, recognition, justice, and sustainable reintegration.

## 3. Theoretical Framework: Structural Violence, Stigma, and Biopolitical Governance

This study conceptualizes sexual violence in armed conflict as a multidimensional phenomenon operating simultaneously at structural, symbolic, and institutional levels. Three complementary theoretical lenses guide the analysis: structural violence, stigma theory, and biopolitics.

First, drawing on Galtung's (1969, 1990) concept of structural violence, violence is understood not only as direct physical harm but also as social arrangements that systematically disadvantage certain groups and prevent them from realizing their full potential. In post-conflict Algeria, the absence of timely recognition, bureaucratic barriers to compensation, and legal ambiguities surrounding children born of rape represent forms of indirect violence embedded within institutional structures (Amara, 2022; Badi, 2018). Thus, violence persisted beyond the battlefield through administrative neglect and social marginalization, illustrating how structural mechanisms prolong the effects of armed conflict on vulnerable populations.

Second, Goffman's (1963) theory of stigma provides a framework for understanding how survivors of sexual violence and their children became socially discredited identities. Stigma functions as a process through which individuals are reduced to a single, socially disqualifying attribute. In patriarchal contexts where female honor symbolizes communal integrity, rape transforms the victim into a perceived carrier of shame rather than a subject of rights (Belaroussi, 2022; Amara, 2022). This symbolic reclassification produces what may be termed "double exclusion": first through the assault itself, and second through community rejection, reinforcing social and familial marginalization.

Third, Foucault's (1976, 1978) notion of biopolitics illuminates how state power regulates bodies, reproduction, and identity. Legal restrictions on abortion, stringent evidentiary requirements for victim recognition, and difficulties surrounding civil registration of "mountain children" illustrate how governance mechanisms shape which lives are formally recognized and which remain administratively invisible (Al Ajarmeh, 2006; Farida, 2023). The management of these bodies reflects broader strategies of social control and post-conflict normalization, highlighting the intersections between state authority and societal norms.

Together, these theoretical perspectives allow the Algerian case to be analyzed not merely as a historical episode of violence but as an ongoing process of identity negotiation, social boundary construction, and institutional regulation. Sexual violence thus emerges as a strategic practice that reshapes social hierarchies, enforces social exclusion, and perpetuates intergenerational trauma long after armed confrontation subsides (Tabbal, 2018; Marwan, 2015).

## 4. Sexual Violence During the Black Decade: Patriarchal Structures, Social Stigma, and Institutional Silence

From a sociological perspective, the experience of women subjected to sexual violence during Algeria's Black Decade reveals the intersection of patriarchal social structures, institutional governance, and political violence, producing what may be described as a form of "double exclusion." This exclusion operates at both physical and symbolic levels, marginalizing survivors not only through the act of violence itself but also through mechanisms of social silence and institutional invisibility. According to research on conflict-related sexual violence, such violence often functions as a socially embedded practice that reproduces power hierarchies and stigma long after hostilities cease (Nordås and Cohen, 2024; Albergaria et al., 2026).

The dominance of patriarchal norms in Algerian society contributed to the absence of comprehensive official data on women and girls who were raped during the conflict. Collective memory and public discourse largely preserved narratives of mass killings, bombings, and material destruction, while sexual violence remained suppressed due to its perceived association with family honor and social shame. Estimates from civil society organizations suggest that between 5,000 and 10,000 women and girls were subjected to sexual assault between 1993 and 1997; yet, no systematic official documentation was produced (Amara, 2022; Al Ajarmeh, 2006). It was not until 2014 that the Algerian state formally acknowledged raped women as victims of terrorism under Executive Decree No. 26/2014, following sustained pressure from human rights groups and psychological support organizations (Amara, 2022).

Socially, victimization extended far beyond the assault itself. Within a cultural framework where women's identities remain closely tied to notions of honor, survivors were frequently subjected to moral scrutiny rather than protection (Goffman, 1963; ICRC, 2024). Women returning from areas controlled by armed groups were often perceived as having "lost their honor," especially if they survived rather than died in captivity. Consequently, many faced expulsion from their families, forced divorce, confinement to the home, or, in extreme cases, so-called "honor killings." Others withdrew from social life or resorted to suicide in response to stigma, internalized guilt, and collective indifference (Belaroussi, 2022; Amara, 2022).

At the psychosocial level, sexual violence produced processes of objectification in which the survivor's body was reduced to an instrument of the perpetrator's will, effectively negating her subjectivity and social existence (Bartels et al., 2015). Survivors often experienced profound feelings of defilement and shame, leading to compulsive practices of physical or symbolic purification as attempts to reclaim bodily autonomy and moral integrity. Testimonies have documented cases of women engaging in repeated religious rituals for symbolic cleansing, while others developed complex psychological coping mechanisms, including emotional attachment to captors as survival strategies (Amara, 2022). Long-term consequences frequently included disturbances in body image, self-harm behaviors, sensory and sexual dysfunction, and persistent psychological trauma, corroborating findings from global studies on conflict sexual violence (Koos, 2017; Rose, 2023).

At the level of public policy, the state's response during the immediate post-conflict period remained limited and largely administrative. Institutional support was

restricted to the establishment of a reception center in Bousmail, which accommodated only a small number of women between 1999 and 2004, following lengthy verification procedures. Such interventions reflected a narrow bureaucratic understanding of victimhood and failed to address the structural dimensions of stigma or to provide comprehensive psychosocial rehabilitation (Al Ajarmeh, 2006). From a biopolitical governance perspective (Foucault, 1978), legal requirements for evidentiary documentation and the absence of proactive state support functioned to control whose suffering was recognized and whose was rendered invisible.

Overall, this case illustrates how patriarchal cultural frameworks, political violence, and institutional silencing intersect to produce and perpetuate social exclusion around sexual violence. A critical sociological reading underscores the necessity of challenging dominant narratives of honor and shame, recognizing survivors as full social subjects rather than carriers of collective stigma, and developing public policies grounded in acknowledgment, psychosocial support, restorative justice, and sustainable social reintegration (ICRC, 2024; Bastick et al., 2024).

## 5. Peace and National Reconciliation as a Mechanism for Ending Violence and Healing Societal Wounds

Algeria endured more than a decade of bloodshed during the 1990s, a period that claimed at least 200,000 lives, mostly civilians, and caused widespread destruction of infrastructure due to terrorist activity. Throughout this time, successive governments attempted to implement economic reforms aimed at improving citizens' living conditions, restoring peace, and curbing violence. However, these efforts largely failed due to the absence of a solid strategy for dialogue with armed groups and a comprehensive approach to national recovery (Farida, 2023).

In 1999, Abdelaziz Bouteflika was elected as Algeria's fourth president, and the population placed their hopes in his leadership to provide a peaceful resolution to the crisis. One of his earliest initiatives was the Civil Harmony Law, which encouraged armed combatants to lay down their weapons. While many responded positively, some returned to armed activity due to the complexity of local and regional dynamics, poor economic conditions, slow implementation of amnesty measures, and limited access to civil rights and social reintegration (Farida, 2023).

As a subsequent measure, the Charter for Peace and Reconciliation was introduced, offering the cancellation of judicial proceedings for individuals who surrendered their weapons. The charter was approved in a national referendum on 29 September 2005, with voter participation exceeding 80% and more than 97% approval, signaling a widespread public desire to end the violence. Nevertheless, the Islamic Salvation Front (FIS) rejected the charter, claiming that its members bore the sole responsibility for the crisis, which initially hindered the definitive cessation of violence, although hostilities gradually subsided (Marwan, 2015).

According to Marwan Azi, head of the judicial assistance cell overseeing the Charter's implementation, by 2014, 8,752 individuals had benefited from the reconciliation measures. Of these, 2,226 were released from penal institutions within the first six months of 2006. The Charter excluded individuals implicated in mass killings, bombings in public spaces, and sexual violence. Furthermore, 44 of 500 cases

concerning children born in the mountains and 270 cases related to detainees in southern centers were processed (Marwan, 2015).

The establishment of values such as peace, dialogue, and reconciliation is central to any national reconciliation process. The overarching objective is to foster a stable, cohesive society capable of enduring peace after prolonged conflict. National reconciliation is inherently holistic, requiring the integration of strategies that promote mutual understanding and cooperation between previously opposed groups. Key measures for achieving these values include:

1. Promoting a Culture of Peace: Rebuilding trust between conflicting parties, encouraging forgiveness, and reconciling with the past.

2. Facilitating Dialogue: Opening formal and informal communication channels, promoting community participation, and fostering reconciliation at the individual and local levels.

3. Promoting Reconciliation: Implementing transitional justice mechanisms, providing support to victims, and rebuilding social cohesion through community development projects, educational programs, and cultural initiatives that enhance cooperation and understanding among diverse social and ethnic groups (Farida, 2023).

## 6. How the Law Dealt with the Issue of Raped Women During the Black Decade

Acknowledging the existence of women who were raped, and recognizing that they are among the victims of terrorism, Algerian law did not exempt them from punishment in the case of abortion, fearing divine punishment for killing a fetus in which God has implanted life, especially if its features are complete (abortion), as well as criminalizing abortion according to Article 304 of the Penal Code. The law punishes the woman and anyone who helps her with imprisonment and fines, forcing many of them to complete the pregnancy and abandon the child at birth as the product of a sinful relationship. Some families agreed to register the child in the name of the maternal grandfather or a married uncle so that he can obtain an official name and birth certificate as an alternative solution to keep the matter secret within a narrow range, but the stigma continues to follow him and he is deprived of inheritance due to the fact that private heirs know the truth, or at least within the family and the circle of acquaintances and neighbors, that he is in fact unknown and illegitimate and therefore has no right to inherit.

Women who were raped by terrorists benefited from financial compensation ranging from $130 to $350, provided the women could prove that they were sexually assaulted and that it was carried out by Islamist militants.

A medical certificate documenting the assault or a copy of the report to the police were among the conditions for claiming compensation. For the majority of the victims, these conditions were simply prohibitive, as their release or escape came months after the events, and the evidence was no longer available. Of course, a large percentage of them were unable to turn to medical centers or the police due to family pressure on the one hand, and fear of reprisals from the militants on the other.

In 1998, the Supreme Islamic Council, headed by the late Abdelmajid Meziane, issued a fatwa authorizing women to have an abortion if the pregnancy endangers the mother's life or her mental and psychological well-being. According to this fatwa, Article 72 of the Health Law was amended and abortion was authorized in the above-mentioned cases. However, after much debate, the supreme recognized a woman's right to an abortion only if she proves that her pregnancy is the result of rape at the hands of armed extremists, and after examining her file, which must include evidence from the police and those who witnessed the incident and were present at the time of the kidnapping.

Women who were raped by terrorists benefited from financial compensation ranging from $130 to $350, provided the women could prove that they were sexually assaulted and that it was carried out by Islamist militants; a medical certificate documenting the assault or a copy of the report to the police were among the conditions for claiming compensation. For the majority of the victims, these conditions were simply prohibitive, as their release or escape came months after the events, and the evidence was no longer available. Of course, a large percentage of them were unable to turn to medical centers or the police due to family pressure on the one hand, and fear of reprisals from the militants on the other. Even if a medical certificate is available, in a society that obsessively reveres the concept of honor, it will not be easy for any woman to "expose" herself and her family and come forward to admit that she was raped. Also, after all these years, there are those who have rebuilt their lives and are no longer willing to remember what happened just for the sake of a handful of money.

## 7. Legal Settlement of the Status of Children of Rape During the Black Decade

Armed conflicts had profound and long-lasting effects on the psychological and mental well-being of affected populations, and children were among the most vulnerable groups. According to the American Psychological Association (APA), civilians accounted for 85–95% of victims in modern conflicts, and children under 18 years constituted approximately 50% of this population (Smith, 2001: 29). The most common consequences included post-traumatic stress disorder (PTSD) and depression. Research published in World Psychiatry in 2018 indicated a proportional relationship between the degree of exposure to war-related stressors and the severity of psychological consequences for children, affecting their ability to adapt across multiple domains throughout their lives (Catani, 2018).

Ignoring this issue had created a risk of producing a new generation of extremists. As psychologist Karima Tabbal, who had treated numerous cases of child trauma through child welfare associations, noted: "Turning a blind eye to this issue meant creating another generation of extremists who harbored resentment and hatred toward their society, no less bitter than that carried by the terrorist" (Tabbal, 2018). Children affected by war internalized feelings of despair and injustice, which manifested in heightened tendencies toward violence, deviance, and the adoption of extremist ideologies.

In Algeria, approximately 600 "mountain children," aged 5–15, faced acute challenges related to civil status and identity, as most were not registered in official

civil records. Verifying parental marriage was often impossible due to the absence of legal documentation. Only 37 cases were processed, while the remainder remained unresolved. Abdelghani Badi, a leader in the Algerian League for the Defense of Human Rights, reported that: "There was no legal mechanism to regularize the status of these innocent children of captivity and sexual violence. Resolving their legal status was only possible through DNA testing; otherwise, they were temporarily attributed to their mothers according to family law. The task was further complicated by the death or killing of parents during clashes between security forces and armed groups, leaving the children in a catastrophic situation in every sense of the word" (Badi, 2018).

From a sociological perspective, the plight of these children demonstrated how structural violence, social stigma, and institutional neglect intersected to perpetuate cycles of marginalization. Post-conflict and national reconciliation policies required addressing these vulnerabilities through legal recognition, psychosocial support, and reintegration programs that restored children's social identity and enhanced resilience. Without such comprehensive measures, children affected by armed conflict remained at risk of social exclusion, potentially becoming both victims and future sources of social instability (Farida, 2023).

## 8. Scholarly Contribution

This article makes a significant contribution to the interdisciplinary scholarship on conflict-related sexual violence by advancing a theoretical and empirical analysis that bridges structural, symbolic, and institutional dimensions of violence in armed conflict. While much of the existing literature tends to depict sexual violence in war as an episodic or tactical phenomenon, this study offers a comprehensive conceptualization that situates such violence within intersecting systems of patriarchy, state governance, and social stigma, showing how these systems reproduce exclusion long after active hostilities have ceased. By integrating Johan Galtung's structural violence framework with Erving Goffman's stigma theory and Michel Foucault's concept of biopolitical governance, the research establishes a nuanced model that foregrounds the social reproduction of violence in post-conflict settings.

In contrast to dominant narratives focusing primarily on sexual violence as a "weapon of war" (Nordås and Cohen, 2024), this study highlights how legal and bureaucratic structures can themselves become sources of ongoing harm, especially in the absence of comprehensive transitional justice measures. Moreover, it contributes empirically by applying these theoretical lenses to the Algerian Black Decade, a case that remains underrepresented in the broader comparative literature on conflict-related sexual violence, which has focused extensively on contexts such as Bosnia, Rwanda, and the Democratic Republic of Congo (Koos, 2017; Albergaria et al., 2026).

The research also responds to recent advances in stigma scholarship that underscore the long-term psychosocial and social consequences of sexual violence in conflict (ICRC, 2024; Rose, 2023), as well as policy-focused analyses emphasizing the need for structural reforms in addressing gender-based violence in war-affected societies (Bastick et al., 2024). By elucidating how post-conflict reconciliation frameworks may fail to address underlying social and legal inequalities, this article

underscores the necessity of holistic and survivor-centered approaches for sustainable social reintegration and justice.

Overall, the study's theoretical synthesis, case-specific insights, and policy implications contribute to advancing debates in peace and conflict studies, gender and violence research, and transitional justice, offering a framework that is both analytically robust and empirically grounded for future scholarship on conflict-related sexual violence.

## 9. Conclusion

This study has examined conflict-related sexual violence in Algeria's Black Decade (1990s) through an integrated theoretical framework combining structural violence, stigma theory, and biopolitical governance. The analysis demonstrates that sexual violence in armed conflict extends beyond individual acts of brutality to encompass systemic, symbolic, and institutional dimensions that reproduce social exclusion, marginalization, and legal invisibility long after active hostilities end.

By situating the Algerian experience within these frameworks, the research highlights the limitations of national reconciliation efforts, which, while effective in halting direct violence, failed to dismantle structural inequalities or address the deep-rooted social stigma faced by women survivors and children born of captivity. The study underscores the importance of holistic, survivor-centered approaches that integrate legal recognition, psychosocial support, and social reintegration to prevent intergenerational trauma and the perpetuation of marginalization.

From a scholarly perspective, this article contributes to debates in peace and conflict studies, gendered violence research, and transitional justice by:

1. Theoretically advancing an integrated model that links structural, symbolic, and biopolitical dimensions of wartime sexual violence.
2. Empirically filling a gap in the literature by examining the underrepresented Algerian context, complementing studies on Rwanda, Bosnia, and the DRC.
3. Providing policy-relevant insights for post-conflict societies seeking to combine security measures with social reconstruction and survivor-centered justice.

Future research should expand comparative analyses across different post-conflict contexts, assess the long-term psychosocial impacts on survivors and their descendants, and evaluate the effectiveness of transitional justice mechanisms in dismantling structural and symbolic forms of violence. Ultimately, understanding sexual violence as both a weapon of war and a socially reproduced phenomenon can inform more effective interventions that uphold the rights, dignity, and resilience of affected populations.

**References:**

1. Al Ajarmeh, A. (2006). Post-conflict rehabilitation and institutional challenges: The case of Algeria. Algiers: Jazairna Publications.
2. Al Ajarmeh, A. (2006). Terrorism and social reintegration: The Algerian experience. Algiers: Dar Al Fikr.
3. Al Ajarmeh, M. (2006). The national counter terrorism strategy. Amman: Published Research, Royal National Defence College.
4. Albergaria, F., Rodrigues dos Santos, C., Frias, A., Lemos Pires, N., and Reis, J. (2026). Sexual violence in armed conflicts: A systematic literature review. In Developments and Advances in Defense and Security, 382–397. Cham: Springer. https://doi.org/10.1007/978-3-032-10947-7_33
5. Amara, F. (2022). Survivors of sexual violence in Algeria: Social stigma and state recognition. Algiers: Society for Psychological Research.
6. Amara, L. (2022). The social and psychological consequences of sexual violence in armed conflicts: Algeria as a case study. Journal of North African Studies, 27(4), 512–531.
7. Badi, A. (2018). Legal invisibility of children born in conflict: The Algerian experience. Algerian League for Human Rights.
8. Bartels, S. A., et al. (2015). Sexual violence in war and post-conflict reconstruction. The Lancet Global Health, 3(6), e298–e299.
9. Bastick, M., et al. (2024). Security sector reform and conflict-related sexual violence. DCAF Report.
10. Belaroussi, H. (2022). Gender, honor, and marginalization: Women's experiences during the Black Decade. Algiers: Human Rights Journal.
11. Belaroussi, L. (2022). Women survivors of sexual violence during the Black Decade in Algeria: Rituals, coping, and social stigma. Algiers: Jazairna Publications.
12. Catani, C. (2018). Mental health of children living in war zones: A risk and protection perspective. World Psychiatry, 17(1), 104–105. https://doi.org/10.1002/wps.20496
13. Davies, S. E. (2025). Using data science to examine conflict-related sexual violence patterns. Griffith University Research.
14. Farida, M. (2023). Peace and reconciliation in post-conflict Algeria: Building social cohesion after the Black Decade. Algiers: University Press of Algeria.
15. Farida, R. R. (2023). The role of the national reconciliation to realise the political development. Research Professor's Journal of Legal and Political Studies, 1–13.
16. Foucault, M. (1976). Society must be defended. New York: Picador.
17. Foucault, M. (1978). The history of sexuality, Volume I: An introduction. New York: Pantheon Books.
18. Galtung, J. (1969). Violence, peace, and peace research. Journal of Peace Research, 6(3), 167–191.
19. Galtung, J. (1990). Cultural violence. Journal of Peace Research, 27(3), 291–305.

20. Goffman, E. (1963). Stigma: Notes on the management of spoiled identity. Englewood Cliffs, NJ: Prentice Hall.
21. Koos, C. (2017). Sexual violence in armed conflicts: Research progress and remaining gaps. Third World Quarterly, 38(9), 1935–1951. https://doi.org/10.1080/01436597.2017.1322461
22. Marwan, A. (2015). Implementation of the Charter for Peace and National Reconciliation in Algeria: Challenges and outcomes. Algiers: Judicial Assistance Cell Report.
23. Nordås, R., and Cohen, D. K. (2024). Conflict-related sexual violence. Annual Review of Political Science.
24. Rose, S. (2023). Stigmatization and social death of survivors of wartime sexual violence. International Studies Association Global Security.
25. Smith, D. (2001). Children in the heat of war: Armed conflict around the world is affecting children in their own backyards. American Psychological Association, 29.
26. Tabbal, K. (2018). Child trauma and the reproduction of extremism: Lessons from Algeria. Algiers: Child Welfare Journal.
27. *** Amara, A. (2022, January 17). Why did you come back, you should have died. Gender - Analytics. Available at: https://aljumhuriya.net/ar/2022/01/17/
28. *** Azi, M. (2015, September 28). Marwan Azi calls for strengthening the Charter for Peace and National Reconciliation with complementary measures. Radio Algerie. Available at: https://radioalgerie.dz/news/ar/article/20150928/53559.html
29. *** ICRC. (2024). How does stigma impact victims/survivors of sexual violence during armed conflict? ICRC Article.
30. *** UN Children and Armed Conflict. (2021, May 21). Report on children affected by armed conflict.
31. *** UNICEF. (2024, December 28). 2024: Une année tragique pour les enfants pris dans les conflits armés, l'une des pires de l'histoire de l'UNICEF. Available at: https://www.unicef.fr/article/2024-une-annee-tragique-pour-les-enfants-pris-dans-les-conflits-armes-lune-des-pires-de-lhistoire-de-lunicef/

# Caring for a Parent with Alzheimer's Disease in Algeria: Lived Experiences, Gendered Roles, and the Invisible Commitment of Close Relatives

**Aicha BENABED**
Lecturer in Health Sociology, Faculty of Social Sciences
University of Oran 2 Mohamed Ben Ahmed (Algeria)
Email: benabed.aicha@univ-oran2.dz

***Abstract.*** *This study examines the lived experiences of family members who provide home-based care to a parent with Alzheimer's disease in Algeria. Situated within the sociology of health, family, and gender, it explores the socio-medical, emotional, and relational work undertaken by close relatives and the effects of this work on caregivers' lives. The research adopts a qualitative approach based on 20 in-depth semi-structured interviews with 12 women and 8 men, supplemented by a socially diverse focus group involving spouses, daughters, and sons of people with Alzheimer's disease. The findings show that family caregivers acquire practical medical knowledge, manage treatment and daily routines, preserve social ties, and assume continuous responsibility in the absence of adequate formal services. Although women remain central to everyday care, men also participate substantially, especially in intimate hygiene, behavioral crisis management, and external decision-making. Caregiving is motivated by filial duty, religious values, reciprocity, and emotional attachment, but it often produces exhaustion, isolation, disrupted careers, and neglected health. The study concludes that Algerian public and legal policy should recognize caregivers as essential health actors and develop institutional support that protects both patients and those who care for them.*

***Keywords:*** *Alzheimer's disease; caregiving; gender roles; family support; Algeria*

## 1. Introduction

Quality of life is shaped not only by individual health and material conditions, but also by the social relationships, roles, forms of participation, and institutional support available to each person. It therefore represents a particularly important sociological concept for understanding how individuals experience well-being, autonomy, dignity, and belonging within society (Otovescu, 2026). In the case of people living with Alzheimer's disease, these dimensions become increasingly fragile, as the progression of the illness transforms everyday interactions, family roles, social identity, and dependence on others. Examining their quality of life consequently requires attention not only to medical needs, but also to the relational and social environments in which care is provided.

This study focuses on the daily care provided by close family members to a parent suffering from Alzheimer's disease. Our objective is to show how these relatives are led to develop medical knowledge and skills that become crucial to the longevity of the person they care for. By "caregivers" we mean "people from the family or close to it who provide some kind of ongoing support to a person experiencing a significant and lasting decline in their abilities and skills"(Blanc, 2010: 1).

Alzheimer's disease and its management provide important topics for sociological study, especially in relation to social representations, public policy, and the role of family solidarity. Alzheimer's is a social phenomenon that impacts the entire social life of the person affected (Baszanger, 1986). Its cognitive effects influence not only memory, but also language, communication, self-recognition, autonomy in daily

life, and sociability. It is a serious medical condition and not a natural outcome of aging, even if it typically appears later in life. The gradual intellectual and physical decline is deeply felt by family members, putting them in complex and difficult situations. The illness is also stigmatizing and sometimes shameful.

In Algerian society, Alzheimer's is considered a collective burden in which the patient causes suffering for their surroundings. Because of the lack of specialized medical-social institutions and the near-total absence of in-home care services, a large part of managing the disease falls on families. The illness progresses toward complete loss of autonomy and eventually death. "This slow progression unfolds in a temporal space that the patient is not always aware of, unlike their family, who must learn to navigate it" (Samitca, 2004: 76). While health systems elsewhere recognize the family's role in supporting individuals with chronic illnesses, in Algeria the contributions of the caregiver (usually a family member) remain invisible, unrecognized, and sometimes even misunderstood by health professionals. Despite this, families remain central and active in illness-related care. Although some theorists have argued that the family's role in caregiving has diminished (Parsons, 1955 [1943]: 158), the involvement of family networks, especially women, continues to be essential to care provision (Cresson, 1995; 2006). Caring for a sick loved one involves a range of tasks performed by relatives to ensure their well-being and adaptation to illness (Strauss and Corbin, 1988). Far beyond healthcare alone, caring refers as much to individuals' disposition, concern and attention to others as it does to care activities: washing, dressing wounds, comforting, etc. Caregiving is a dynamic, interactive process made up of multiple stages reflecting the evolution of the caregiver–recipient relationship. It must be considered holistically, accounting for the duration of care, available resources, and the motivations of those involved (Corbin, 1992).

Socio-medical caregiving tasks are often unrecognized, unpaid, and deeply shaped by gender norms. They tend to be invisible, viewed as natural and taken for granted. These practical and material duties include treatment, hygiene and bathing, daily activities, and emotional and relational support. Family care combines both practical and emotional labor, forming what becomes a "burden" and a true "job," constituting part of what Waissman (1990) refers to as "medical work," which includes "emotional labor." It is within this framework of care management by the family that this study is situated. It focuses closely on the lived experiences of supporting and caring for a parent with Alzheimer's disease

## 2. Methodology

This field study is based on a qualitative approach, relying on 20 in-depth semi-structured interviews (12 women and 8 men), as well as a socially diverse focus group composed of family members (wives, daughters, and sons) of individuals with Alzheimer's disease. Access to participants was made possible through a neighbor of a relative whose father suffers from Alzheimer's. We met this neighbor at the hospital and asked for the contact details of another relative of someone with the disease in order to initiate a snowball sampling process. The interviews took place mostly in the participants' homes, with three conducted in a hospital setting and two in a public park. We did not conduct interviews with the patients themselves—not due to a lack of interest in their perspective, but because our primary research focus was on the experiences of their family members. Caregivers are at the heart of this investigation.

Here, they are considered those who face and manage the complexities of caregiving firsthand.

These caregivers are mainly the children (both women and men) of the individuals affected by Alzheimer's, and typically fall within the age range of 45 to 49 years. This age bracket reflects the Algerian and broader Maghrebi cultural context, where elderly individuals commonly live with their families and are primarily cared for by their descendants. Many of the caregivers interviewed were single women—available on a daily basis and possessing distinct skills gained through hands-on experience with their ill relatives. Male caregivers, on the other hand, were usually over 40 years old and married.

This methodological approach is particularly suitable for understanding people's ways of speaking and acting from their own perspective and for grasping how they construct their social reality. It highlights socially constructed narratives, which represent particular versions of lived reality. As Stéphane Beaud and Florence Weber (2003) suggest, the aim of such an approach is to uncover the meanings and interpretations individuals assign to their experience, or to understand the logic behind their actions. By placing the family or the close relative at the center of the caregiving experience, this method positions them as active agents in the medical labor that supports the patient's life. An inductive analysis of the interview data—covering caregiving activities, decisions, and difficulties—revealed recurrent themes and meaningful insights. The strength of this study lies in its close engagement with the reality of home care. The findings are structured as follows: first, we explore informal (non-professional) caregiving as an alternative to formal medical work. Second, we examine the range of tasks performed by caregivers. Although central to healthcare, this informal labor remains largely invisible and unrecognized.

The caregiving practices of family members are shaped by a gendered division of labor. Unlike what is commonly assumed in chronic illness contexts, men are actively involved in care activities. For caregivers managing the disease, supporting a loved one involves both daily practical tasks and an emotional dimension. Third, we explore the caregivers' sacrifices for the well-being of their ill relative, paying particular attention to their motivations and the reasoning behind their commitment. Finally, we examine the impact of caregiving on the caregiver's health, described as a source of distress and fragility. These consequences weigh heavily on their well-being. The health of the caregiver is therefore a central concern—seen as one of the key conditions for enabling the patient to remain at home.

## 3. Results

### 3.1. Family Support: An Alternative to Medical Work

Alzheimer's disease is a progressive illness that initially manifests through mild memory issues. It gradually worsens, affecting the person's ability to manage essential daily tasks such as eating, dressing, personal hygiene, and bathing. Caregivers, both men and women, mobilize to care for this person, investing themselves in daily routines regularly and permanently. They take on all domestic tasks, medication management, financial management, daily social accompaniment, administrative processes, psychological support, and more, all in an effort to provide comfort and

relieve suffering. Yet, despite their efforts, their work often goes unnoticed (Molinier, 2013).

In most cases, care is provided by a close family member or someone within the patient's immediate social circle. This might be the spouse, sibling, daughter, son, or daughter-in-law (Cresson and Mebtoul, 2010). The family becomes not only the primary therapeutic environment but also a crucial emotional and social resource for the patient. Often, one specific person either volunteers or is designated to take full responsibility for caregiving. This individual becomes the principal caregiver and assumes a central role in care provision. Their active engagement is vital to the patient's psychological, physical, and social well-being. Interview analysis reveals that caregivers begin their involvement as soon as the first symptoms appear. Learning to observe, interpret, and understand the signs of Alzheimer's is critical for anticipating the patient's needs on a daily basis. This constant vigilance places caregivers in a state of permanent alertness, which over time becomes exhausting and anxiety-inducing.

> "I noticed changes in his behavior. He was having memory problems, confusing time, places, and people. He would recount old stories from the colonial era and start shouting. He couldn't sleep, and I had to stay awake to watch over him. I suspected it was Alzheimer's and talked to my brothers about it. Their response was, 'It's normal, it's just age.' But his behavior became increasingly inappropriate and regressive. I was very worried, which led me to do some online research and eventually consult a neurologist at the hospital. He refused to go to the doctor. He would shout and became very agitated. In the end, my brothers decided to bring a doctor to the house to confirm or rule out an Alzheimer's diagnosis." (Louiza, 43 years old, administrative law graduate, homemaker).

The term Alzheimer's is often used lightheartedly or even ironically to describe a simple memory lapse, but as an actual diagnosis, it evokes deep anxiety on both individual and collective levels. It generates fears associated with aging and mental decline (Ait Allaoua, 2023: 63). Many young women, like Louiza, learn to recognize the symptoms and frame their parent's condition as pathological, prompting them to seek medical intervention. Caregiving is based on a cognitive posture that may feel natural but is essential for informing health professionals.

Observing, listening to, and remembering their father's behavior becomes a set of crucial resources that women use in their monitoring work, whether at home or even during hospital stays. Within this context, women take on an essential caregiving role, one aligned with their socially assigned "natural" reproductive functions, which have long been associated with caring for others (Saillant, 1992). As a result, they often find themselves in a position of familial support.

Testimonies demonstrate the wide range of tasks caregivers perform, tasks that extend far beyond the home. When their loved ones are hospitalized, their caregiving duties do not stop. By highlighting the socio-medical tasks performed by both women and men in dual spaces, domestic and clinical, the study shows how women often become interpreters of their ill parent's needs. They offer emotional support while developing diverse practical skills. However, this type of intervention into the private sphere of the ill person often sparks conflict among siblings. "The loss of the ability to decide and judge what is good or bad for oneself becomes a dominant theme in social representations of Alzheimer's" (Scodellaro, 2008).

The act of "deciding for someone else" with Alzheimer's is a major concern among the family members interviewed. Some see it as common sense and a form of protection; others believe the progression of dementia inherently reduces the patient's decision-making capacity. Still, Gzil (2009) argues that it is important to move beyond the presumption of decision-making incompetence. Whether this intervention is accepted or challenged often depends on the nature of the existing relationship. Spousal or parent–child dynamics may either validate or undermine the legitimacy of the caregiving role (Miceli, 2016).

Decision-making responsibilities are more often assigned to sons. There is a clear gendered divide: women are perceived as better suited to hands-on, domestic, and caregiving tasks, while men are seen as more appropriate for handling external matters and material decisions. These gender dynamics also shape the emotional and relational aspects of Alzheimer's care.

### 3.2. The Strong Presence of Men in Caregiving Activities

Many studies have shown that in the context of chronic illness, caregiving is primarily performed by women. Typically, the patient is cared for by his wife, mother, sister, daughter, or daughter-in-law (Cresson and Mebtoul, 2010). Men have generally played a supporting role, limited to financial contributions. However, in the case of Alzheimer's disease, men are equally capable of performing all the non-medical caregiving tasks. As Cresson (2006) asserts, there is nothing "natural" that prevents them from doing so. Still, in households where a woman is present, most often a daughter or a sister, she is considered available by default.

Within this framework, the fieldwork in this study shows that men also have a significant role to play in caregiving. Their involvement goes beyond financial support. Male roles in care often operate discreetly, in the background of illness management. Their presence, in many cases, is not necessarily a matter of choice, but rather a response to the specific demands of Alzheimer's disease. Care therefore raises a question of gender, of the division between male and female.

These men play a vital role in caring for relatives who have become vulnerable due to age, illness, or disability. Their importance becomes particularly evident in situations where the person with Alzheimer's displays violent or erratic behavior. In such cases, it is often the sons or brothers who step in to care for the patient. The caregiver finds himself unable to separate from a parent who has become a danger to themselves or to others. Patients with Alzheimer's often suffer from behavioral disturbances. In the context of mental health, these are commonly linked to perceptions of danger, threat, or loss. Becoming a caregiver in such circumstances means adopting a new identity, "becoming the parent of one's own parent." The caregiver's presence becomes a source of protection and security, both physical and psychological, for the patient. That said, men are more likely than women to delegate personal care tasks. The gender of the patient also makes a difference: when the patient is male, tasks such as intimate hygiene and bathing are often more comfortably handled by a son (or son-in-law) than by a daughter.

This dynamic reflects a gendered division of labor within caregiving. Intimate hygiene is a daily necessity that becomes increasingly difficult for the patient to manage. Intimate bathing involves confronting the patient's nudity, which can be a source of discomfort for both patient and caregiver. In cases where the wife is ill or

deceased, these hygiene-related tasks, like bathing or showering, may fall to the daughter. However, many daughters experience discomfort at being exposed to the intimate aspects of their father's body, which had previously remained private and unseen. As a result, many daughters turn to their brothers for help. In such cases, entrusting this care to a male figure is considered acceptable, even "normal," as it helps preserve the dignity and integrity of the relationship. Here are some illustrative accounts:

> "My mother always took care of my father's personal hygiene at the beginning of the illness, but she passed away. So I stepped in to replace her. If I had a brother, I would have delegated that task to him." (Woman, 45 years old, single, homemaker).

> "It's the least you can do to take care of your parents. Children are obligated to help their parents. For me, taking care of my father is non-negotiable. It's the same for my mother. When my wife is busy or away, I take care of him myself. I use a little humor—tell jokes, chat, share stories he enjoys. That helps ease the discomfort of having his son assist him with intimate hygiene." (Man, 48 years old, teacher).

Assuming the role of caregiver, or that of a dutiful child, helps make even the most difficult or awkward caregiving tasks feel acceptable (Mercadier, 2002: 251). The close caregiver uses symbolic strategies to reduce mutual embarrassment and to help the patient accept care. As seen in the quote above, humor and shared moments can transform potential discomfort into emotional closeness, helping to spark positive emotions such as warmth and even laughter between caregiver and patient.

Men's involvement in personal care reflects a particular understanding of marital and filial bonds. The feeling of filial duty often outweighs discomfort related to intimate caregiving. The end goal, providing care, takes precedence. In general, and particularly with regard to intimate care, assistance is seen as an extension of the service-based relationship that defines family bonds. For some female caregivers, helping their father with intimate hygiene is not a barrier. This further illustrates that family relationships guide how Alzheimer's care is approached. The nature of the conjugal or filial relationship can be a strong motivator for becoming involved in personal care.

It is important to point out that in Algeria, family caregiving is not yet formalized or professionalized. For many families, transforming a private problem into a public issue is difficult, especially when it touches on matters of intimacy and confidentiality. Despite the social changes Algerian families have undergone, the concept of family ties remains largely unchanged. The family continues to be a stable foundation, a highly valued and deeply desired ideal.

### 3.3. Socialization Work

It appears that one of the often-overlooked aspects of caregiving involves preventing the social isolation of the patient. Indeed, the societal image of Alzheimer's disease or dementia can lead to a gradual severing of external social ties, resulting in a retreat into the family sphere, often accompanied by feelings of guilt or shame. Loved ones often experience embarrassment because the aggressive or unpredictable behavior of the person with Alzheimer's is a major source of stigma and social

discomfort. The prevailing perception of Alzheimer's patients effectively excludes them from social life, they are seen as already "gone," defined by their "incompetence" and absence. It is a form of social death. The socially inappropriate behaviors of Alzheimer's patients can happen anywhere and with anyone, often unexpectedly. Yet, some caregivers choose to act differently. Consider the following account:

Nadia, age 45, single, gave up her plans for marriage to care for her 70-year-old father with Alzheimer's. She tells us:

> "I like my father to go out and see his friends. Even though he's sick, he still needs social contact. But it's difficult and risky, so we have to find ways around it. My brother handles the invitations. Most of the people we invite know about his illness. They try to stimulate his memory by sharing old stories, laughing together over coffee, having a meal, or watching a football match."

Friends, neighbors, former coworkers, and extended family can all serve as a valuable social network, offering companionship and shared moments with the patient at home. These individuals are often of the same generation as the patient, or slightly younger. The support offered by this extended network, including neighbors and former colleagues, can be crucial in creating a supportive environment. A diverse support network helps patients gain a sense of empowerment over their illness and develop coping skills (Corroy and Chauzal-Larguier, 2024: 14).

> "I always feel like he's in danger. I have to be around constantly. About six months ago, he opened the door and left the house. An hour later, we learned he'd been in a car accident" (she cries). "He had a minor femur fracture… he was bedridden for a few months. Pressure sores developed, and I got really worried because those can cause serious, even life-threatening, complications. I treated them with honey dressings. I'd clean the wound with saline, apply honey, and wrap it with a bandage before the doctor administered morphine. I'd move his body, change his position regularly to relieve pressure on the sores. I have to monitor him closely because he becomes agitated and nervous."

This caregiver puts preventive strategies into place to ensure the well-being of the patient. Over time, she has acquired expertise and technical knowledge through lived experience. She now performs medical tasks that require advanced skill, developed through repeated practice and familiarity with the illness. As Waissman (1995: 83) explains, this is a form of medical labor requiring learned techniques and practical knowledge about the disease. The caregiver becomes the primary provider of care—first within the family, then even in hospital settings where she continues performing technical tasks. Faced with pressure sores caused by extended bedrest, the caregiver adopts a routine of muscle stimulation and posture changes to prevent further damage. These practices aim to replace the function of weakened or inactive muscles and to avoid long-term pressure on sensitive areas. Within the broader context of caregiving, family support often reflects a so-called "natural" solidarity among relatives. Interview analysis reveals that even those who do not live with the patient can step in to help when the primary caregiver, who is usually the daughter, is unavailable. Even if geographically distant, these family members are considered part of the caregiving structure.

Male presence becomes particularly necessary when managing aggressive or resistant behavior. For example, when the patient refuses medication, symptom-relief drugs are often all that can slow the illness's progression. In-home care requires constant supervision and sometimes the presence of multiple people. Tasks like calming the patient and administering medication cannot always be managed by one person, particularly when the primary caregiver is working alone. Male relatives—especially brothers and uncles—are frequently called upon to assist.

Interviewees consistently point to the presence of male caregivers as being useful and even indispensable. Yet, the caregiving skills deployed by family members are rarely acknowledged or valued by others in the family or by healthcare professionals. The active role of the family caregiver in supporting their ill relative highlights their position as a central healthcare actor—possessing experiential knowledge and developing a wide array of informal caregiving practices (Benabed, 2024: 155). Discourse analysis also helps illuminate the connection between motivation and the act of caregiving, allowing us to better understand what drives people to make such a commitment.

### 3.4. The Motivations Behind Caregiving

Supporting a loved one throughout their illness is not just an act of compassion, it is a non-transferable moral commitment and an intimate experience. A strong familial bond, a sense of duty, and the feeling of being needed nourish the caregiver's motivation to help. This commitment reflects both familial and religious values. Kinship, in this context, is viewed as a "system of action": "Kinship defines the rules of interpersonal behavior—be it rights and duties, attitudes of deference, familiarity, avoidance, or humor." (Weber, 2002: 74)

> "In our culture, a family member must take care of their sick relative, especially their parents. It is written in the Quran. God insists on the importance of caring for one's parents and advises us never to frustrate or wound them with our words."

Family caregiving follows a logic of mutual obligation, a kind of gift exchange rooted in intergenerational duty. It involves giving time, love, and attention, with the hope of receiving gratitude or even symbolic recognition in return. Since parents have given so much throughout their lives, they are seen as having earned continuous and legitimate care from their children (Godbout, 2000).

> "When I was little and got sick, it was my father who cared for me, who looked after me. So now it's my turn to do the same for him. And maybe, if I have kids someday, they'll take care of me too."

Children appear as key players in the process of supporting the patient. For many, caregiving is a matter of availability, which forces them to reorganize their lives to face hardship and suffering. These caregivers view their role as a moral obligation, often driven by emotional ties and a sense of responsibility to their parent. Gratitude and duty also serve as justifications for their commitment, seen as the rightful repayment of a lifelong debt and aligned with core social values.

The care provided is also perceived as a personal sacrifice. It is deeply valued by those who give it. For them, caring for their ill parent becomes their primary purpose in life. Many caregivers believe they are the only ones capable of fully

understanding and responding to their loved one's needs: "This is the most important thing in my life. I can't imagine doing anything else while my father is suffering." Caregiving becomes both a human and existential act. The caregiver may even find personal meaning and purpose through these efforts, feeling more alive by helping another.

### 3.5. The Impact of Caregiving on the Caregiver's Health

It is important to refocus our attention on the extent of the impact that caring for a parent with Alzheimer's disease has on the caregiver. The lived experiences of those caring for relatives with Alzheimer's reveal the presence of a suffering social actor, one who often remains in the shadow of the illness. Providing care can have physical, psychological, and social consequences for caregivers' health. In managing the illness, caregivers face both physical and emotional strain. While the loss of autonomy renders the patient vulnerable, the caregiver, who gradually compensates for this decline, also enters a state of vulnerability. It is often said: "The caregiver becomes more ill than the patient" or "The one taking care of the sick person is actually the one who's really sick."

Caregivers adapt to the demands of this new reality, prompting a reorganization of family life. They take on ever-changing responsibilities and often go through morally painful experiences. Many suffer a "double burden." They forget about their own health and, in turn, are forgotten. The well-being of family caregivers is often overlooked. They frequently experience mental exhaustion, stress, lack of personal time, isolation, and a sense of being unacknowledged by those around them. Social disruption is even more pronounced when the caregiver has professional responsibilities. Balancing the care of a sick loved one with the rest of one's life becomes a significant challenge. Caring for a sick relative imposes heavy constraints and leaves little time for personal needs or self-care. For women in particular, this domestic and familial "career" offers little room for professional aspirations and often prevents them from pursuing any meaningful career path.

Doubt and inner conflict cloud the formulation of future life plans, whether it's building or buying a home, getting married, pursuing education, or developing a career. These limitations can give rise to feelings of failure, injustice, and guilt. Some caregivers admit they are not truly living their own lives. Others suffer from health issues themselves and report feeling exhausted. The life of a caregiver is often extremely taxing. Driven by a sense of duty, many caregivers neglect their social, family, and personal lives, including their own health. While this devotion may feel natural, it often comes at a high personal cost. Many face responsibilities for which they are not adequately prepared. "Due to a lack of resources, support, and guidance, our task becomes too heavy to bear… Chronic illness itself is a source of stress and a burden for the entire family."

While caregiving may begin as an act of love for a sick parent, it is also marked by suffering, anxiety, and emotional exhaustion. It becomes clear that both the patient and the caregiver must be at the center of any healthcare approach. Yet in many medical consultations, the caregiver is solely focused on seeking treatment for the patient and never for themselves despite being in need of care and attention, too. The demands of caregiving often strip the process of its human dimension, leaving the caregiver feeling helpless and emotionally overwhelmed. Many caregivers begin to

question their ability to balance their caregiving duties with their professional and personal lives.

## 4. Conclusion

This study, which differs from typical analyses of chronic illness management, has shed light on the caregiving work surrounding individuals with Alzheimer's disease, which is an often overlooked and under-recognized role in Algeria (Bloch, 2012). The care given to those affected cannot be limited to a medical approach. It involves complex and challenging situations for the surrounding family. Home-based care contributes to a form of "domestic medicalization." Many caregivers still hold an idealized view of the traditional family as one marked by intergenerational solidarity. This study also highlighted the crucial role and presence of close relatives in the patient's journey, drawing attention to the potential risks caregiving poses to the health of caregivers themselves.

Caring for individuals with Alzheimer's disease at home now demands greater attention to both the emotional, relational, and physical needs of the person being cared for and the caregiver. Recognition of the caregiver and their lived experience throughout the illness could help reshape institutional approaches to care. Some even advocate for the professionalization of home-based care and greater attention to caregivers' well-being, enabling them, in turn, to care more effectively for their loved ones. In Algeria, the gendered and asymmetrical division of caregiving places a significant burden on women caregivers, whose own well-being is often overlooked. Therefore, this issue of caregiving deserves to be addressed through legal and public policy.

## References:

1. Ait Allaoua, K. (2023). Alzheimer's disease, family narratives, and identity quest in Mémoires au soleil by Azouz Begag. Synergies Algérie, (31), 63–74.
2. Baszanger, I. (1986). Chronic illnesses and their negotiated order. Revue française de sociologie, 27(1), 3–27.
3. Beaud, S., and Weber, F. (2003). Guide to fieldwork: Producing and analyzing ethnographic data. Paris: La Découverte.
4. Benabed, A. (2024). Around long-term illnesses: Caregivers as health care actors and providers. The case of Algeria. In L. Corroy and C. Chauzal-Larguier (eds.), Patients, caregivers, and health professionals: Structures, issues, and representations. London: ISTE Editions.
5. Blanc, A. (2010). Family caregivers: Introduction. Grenoble: Presses Universitaires de Grenoble.
6. Bloch, M.-A. (2012). Caregivers and the emergence of a new interdisciplinary field of research. Vie sociale, 11–29.
7. Corbin, J. (1992). Care: A theoretical framework for an interactive path. Revue Internationale d'Action Communautaire, 28(68), 39–50.
8. Corroy, L., and Chauzal-Larguier, C. (2024). Patients, caregivers, and health professionals: Structures, issues, and representations. London: ISTE Editions.
9. Cresson, G. (1995). Domestic health work: A sociological analysis. Paris: L'Harmattan.

10. Cresson, G. (2006). The family production of care and health: Late and incomplete recognition of essential participation. Recherches familiales, (3), 6–15.
11. Cresson, G., and Mebtoul, M. (2010). Family and health. Rennes: ENSP Editions.
12. Godbout, J.-T. (2000). The gift, debt, and identity. Montréal, and Paris: Boréal and La Découverte.
13. Gzil, F. (2009). Alzheimer's disease: Philosophical issues. Paris: Presses Universitaires de France.
14. Mercadier, C. (2002). The emotional labor of caregivers in hospitals: The body at the heart of the care interaction. Paris: Seli Arslan.
15. Miceli, P. (2016). Paying attention to emotions in family care of Alzheimer's disease. Gérontologie et Société, 38(150). https://doi.org/10.3917/gs1.150.0059.
16. Molinier, P. (2013). The work of care. Paris: La Dispute, "Le genre du monde" collection.
17. Otovescu, M.C. (2026). Quality of Life. In Otovescu, D. and Otovescu, C. (eds.), *Contemporary Sociology: Fields of Study and Representative Concepts*, Vol. 1, 271–314. Craiova: Beladi.
17. Parsons, T. (1955 [1943]). The kinship system in contemporary United States. In Elements for a sociology of action (French trans.). Paris: Plon.
18. Saillant, F. (1992). Women's role in healthcare. RIAC: Taking Care. Social Links and Institutional Mediation, Special Issue 28(68), 95–106.
19. Samitca, S. (2004). The "second victims": Daily life with someone suffering from Alzheimer's disease. Sciences Sociales et Santé, 22(2), 73–95.
20. Scodellaro, C. (2008). Social representations of Alzheimer's disease: A literature review. Actualité et dossier en santé publique, (65), 36–38.
21. Strauss, A., and Corbin, J. (1988). Unending work and care: Managing chronic illness at home. San Francisco: Jossey-Bass.
22. Waissman, R. (1990). The medical work of the family. In P. Aïach, A. Kaufmann,, and R. Waissman (Eds.), Living with serious illness (pp. 175–225). Paris: Méridiens-Klincksieck.
23. Waissman, R. (1995). Family interactions and the impact of technology in managing chronic illness in children. Sciences Sociales et Santé, 13(1), 81–89.
24. Weber, F. (2002). Rethinking contemporary kinship: Household and kinship networks as tools in anthropology. Droit et Société, (34), 73–106.

# The Impact of Drug Use on Young Delinquents: Social, Legal and Economic Consequences

**Dan Constantin AGHEORGHIESEI**
Ph.D., Doctoral School of Social and Political Sciences,
Alexandru Ioan Cuza University of Iasi (Romania)
Email: danagh2013@yahoo.ro

***Abstract:*** *This article presents the impact of drug use among young offenders and their addiction to narcotics. The phenomenon of drug use among young people is constantly increasing, from year to year. The need to analyse, on the basis of a well-defined documentation, such an impact will contribute to reducing the demand for drugs through the formulation of effective social policies. Illicit drug use is considered one of the important factors that negatively influence the population, having a significant contribution to the increase of organized crime. We analyze the impact of drug use on young delinquents in the city of Iasi from the perspective of certain sociological theories. The algorithm of consumption (ecstasy, identity crisis, state of dependence) is highlighted, then the social spaces in Iasi where the sale and consumption of prohibited substances take place, the motivations for consumption, its social, legal and economic consequences are presented. The sociological analysis of drug use illustrates the risks of mental illness, behavioral slippages and formulates solutions regarding the social insertion of young delinquents convicted of acts related to illicit drug consumption and possession. The variety of ways in which young delinquents end up consuming drugs is disconcerting, so it becomes a national necessity to think and develop public policies capable of diminishing and controlling drug use more effectively in today's Romania.*

***Keywords:*** *drug use; juvenile delinquency; addiction; social consequences; public policies.*

## 1. Introduction

Drug use is undoubtedly one of the most important social problems for modern societies, all the more so as the phenomenon presents upward trends. Discussions about drug use as a type of deviant and, at the same time, illegal behavior, addiction to prohibited substances determine the increase in the probability of influencing consumers among young delinquents to get involved in criminal activities such as organized crime. To all this is added the commission of crimes specific to illicit drug use, due to the decrease in inhibitions, the increase in emotional states (Ştefani, 2018: 215–216), including the affectation of the trial process. Annually, reports are made that provide us with assurances, regarding the compliance with the legislation regulating prohibited substances, reports (Rădoi, 2015: 129) that also aim to attract the criminal liability of young offenders by applying custodial sentences.

The present study analyzes the abusive drug consumption among young delinquents in Iasi, its impact on society and the legal measures that can be applied in relation to the legislation in force. The imposition of custodial sentences on users of prohibited substances can trigger a series of dysfunctions in terms of the behavior of drug addicts. More specifically, the prison environment can be a remedy in terms of the detoxification of the convicted young man or it can aggravate the addiction to narcotics. Young people convicted of crimes related to drug use undergo specific therapies, counseling in order to correct criminal conduct and, subsequently, after serving their sentence, they can be reintegrated into civil society as citizens without contact with the criminal law.

This article will make a brief incursion into the world of drug users, researching especially the onset of young people in the criminal environment and the factors that influenced the consumption of prohibited substances. These factors are the following: geographical position of the locality, degree of education, standard of living, religious affiliation, etc. All these factors directly influence the development and encouragement of young people in committing narcotics crimes. The case studies carried out on young drug users involved the analysis of the way in which they purchased drugs for their own consumption, sold prohibited substances, made their home available to other people for the purpose of consuming drugs. Later they were sent to trial and then convicted according to the Romanian criminal law in force.

The need for new policies on illicit drug use to help young offenders is likely to clarify some aspects regarding the possibility of legalizing certain types of drugs for medical or recreational purposes. The purpose of legalizing the so-called "soft drugs" is to better reduce and control the illicit consumption of prohibited substances (Ştefani, 2018: 200).

The phenomenon of drug use is part of the category of social phenomena with particularly serious consequences, so that the multitude of causes that lead to illicit drug use is almost impossible to determine. Due to social transformations, the crime rate is constantly increasing. Drug consumption among convicted young people being already raised to the level of scourge, a new direction is required to determine the allocation of human resources (Ursan, 2017: 14) and financial resources specific to the analyzed phenomenon. Regarding the impact of drug use among young delinquents, we note the lack of effective involvement of the authorities, the lack of information on the harmfulness of prohibited substances, the lack of non-allocation of funds to support the reduction of drug consumption, aspects that describe Romania (Gheorghe, 2018: 5) as a country transited by narcotic substance traffickers and which tolerates or encourages (indirectly) drug use.

In the context of the convictions of young delinquents for committing crimes related to drug trafficking and illicit consumption, the scientific research is mainly aimed at analyzing the phenomena that determine the appearance of states of ecstasy and identity crises, all ending with the installation of the state of addiction. All of this has a strong impact on consumers between the ages of 14 and 18. The harmful aspects of drug use have been the subject of study over time of many analyses and case studies that have tried to explain the phenomenon of substance use among young delinquents. These studies came to their aid and to the institutions involved in the process of eradicating the phenomenon in depth.

A classic model that came to identify a person's individual and social motivations was the one analyzed by Abraham Maslow. The author starts in his study from biological needs and social needs and goes so far as to create a hierarchy that determines the main needs of the person in society, considering as a starting point the physiological drives of each individual (Maslow, 1970: 35).

We also used in our study certain sociological theories that focus on the analysis of norms, rules of social coexistence and deviation from the natural route. They emphasize the lack of social control, but also the lack of involvement of the "socialization instances" that have the possibility of supervising the deviant phenomenon of the individual in society. Drug consumption in civil society is assimilated to criminal behavior and contributes abundantly to social dysfunction.

Therefore, it is necessary to use a functionalist sociological perspective meant to recognize the groups of consumers among young delinquents, to study the habits inside and outside the groups, to identify the ways of practicing the consumption of prohibited substances.

In turn, social, legal and economic consequences will be analyzed in terms of the impact of drug use among young delinquents, the typology of users, interventionist policies in stopping the studied phenomenon, rehabilitation modalities and recuperative therapies adapted to the level that the drug user has at the time of evaluation. In fact, the policy of the courts of law in Romania adopts a trenchant position towards the users of high-risk or high-risk drugs. The solutions pronounced are especially aimed at the application of punishments that try to discourage the illicit consumption and trafficking of drugs among young delinquents.

Taking into account that at the level of the European Union there is a worrying increase in the illicit consumption and trafficking of drugs in violation of the legislation in force, it is necessary to update the statistical data that reveals approximately the number of drug users. Finally, communication between state institutions and consumers can lead to encouraging results.

## 2. Sociological theories regarding deviant behavior

One of the important theories that address the theme of deviant character can be found in *Social Structure and Anomie*, a work by sociologist Robert K. Merton. The author explains at length how pressure is exerted on some people by other people, in order to make them engage in deviant activities (Merton, 1938: 104).

In support of the theory of anomie, Merton argues that, in a world in competition, intensively concerned with material problems and directed towards the fulfillment of this desire, the individuals in society are guided towards the path of success. This in reality is practically achievable only by a part of the individuals, and those who give up the fulfillment of the goal are considered deviants or separate persons from society (Merton, 1957: 105).

Deviant behavior is determined, in our case, by drug use. It occurs when material success is closed or restricted, thus opening the way for individuals to engage in deviant activities (Merton, 1938: 89). The largest number of drug users acquire deviant behavior from childhood, which slows down their process of self-knowledge.

According to the theory of social control, people mostly do not accept deviant behaviors due to social connections, assumed beliefs and the message of the authorities (Ursan, 2017: 64). If these connections are broken or dismantled, then individuals give up social norms and rules, and then adopt the rules of a deviant character, such as drug use. Another theory, that of self-control, insists on the idea that drug use is a common and even natural thing, so that these deviant characters manifested among people become natural and not abnormal.

Regarding the theory of subculture, we mention the special contribution of Becker Howard, who made important contributions by studying the phenomenon of marijuana use. He explains how an individual first uses marijuana and then how he becomes addicted to the drug (Howard, 1963: 56). In turn, sociologist R. M. Williams makes important contributions to the study of the mechanism of deviant character developed in individuals in society (Williams, 1951: 121).

In the theory of "differential association" (Schur, 1980: 210), the main idea is that deviant behavior is behavior copied from the interactions of individuals with other individuals. Finally, it is defined as conformist behavior.

Regarding the study and analysis of drug use and abuse, we also emphasize the contributions of the authors Sorin M. Rădulescu and Cristina Dâmboeanu from the work *Sociology of drug consumption and abuse*. Here, the deviance resulting from addiction to excessive drug consumption is an object of sociological interpretation from various perspectives. That is why there are currently numerous models and theoretical conceptions regarding the research of the relationship between deviance and drug use (Rădulescu, 1998: 58). The two authors deal with the problem of the consumption of prohibited substances based on studies centered on the person of the user, with reference to the essential traits of the individual. Analyses focused on the social impact are also taken into account, with reference to external aspects that influence the individual (Rădulescu and Dâmboeanu, 2006: 182). We also point out Andrei Oişteanu's theoretical contributions on topics dealing with narcotics and hallucinogens in Romanian popular culture, presented from an anthropological, historical and religious point of view.

### 3. Objectives, hypotheses and basic concepts of the research

The general objective of this study is to analyze the illicit drug use among young delinquents in Iasi and the mechanisms that make the transition from the state of ecstasy to the identity crisis and the appearance, finally, of the state of addiction. In this respect, the causes that determine young people aged between 14 and 18 to consume prohibited substances are significant, then the investigation of the ways of purchasing prohibited substances and the types of drugs consumed.

Starting from the studies on illicit drug use and from the research of the phenomena that make the transition from ecstasy to identity crisis to the appearance of the state of addiction, within the present investigative approach we proposed to analyze the way in which excessive drug consumption precedes criminal behavior and contributes to the appearance of juvenile delinquency. Our assumption is as follows: drug use among young people leads to the emergence and development of behavioral traits specific to people addicted to drugs.

Our sociological research uses three essential concepts from the literature. The first of them refers to ecstasy. It is known that drugs take the user out of the normal state or the state of spiritual restlessness and send him to a world of "happiness". Later, the joy turns into a nightmare from which he seems to have no escape. Some of the authors invoked who use the concept of "state of ecstasy of drug consumption" in expression. They argue that this condition can lead to mental alteration or the appearance of diseases associated with those of an infectious nature.

The other concept refers to the identity crisis of the drug user. Psychotic behaviors cause this crisis. That is why on countless occasions the individual has imaginary dialogues with non-existent people. He feels assaulted and followed, aspects that can aggravate his psychotic state. The identity crisis triggers conflictive states. The consumer's judgment is clouded by dark thoughts, and the only remedy that the individual considers necessary in his cure is drug addiction. Specialists also note that the degree of socialization of those in a state of crisis is selective (Abraham, 2004: 128).

Finally, the third concept used in our study is the one related to the state of addiction. This is a reality that occurs in the case of excessive drug use and manifests itself especially among people who come from disorganized and uneducated families. It is known that alcohol consumed in large quantities can trigger deviant behavior. In this regard, Maurice Cusson concludes on the basis of the studies carried out the existence of different categories of deviant behaviors. All these categories of consumption have consequences of a psycho-social nature (Cusson, 1997: 21). Thus, the consumer's desire for adventure can turn into a state of addiction that can only be removed by psychiatric treatments or therapies specific to neurological diseases. Drug addiction is what causes the consumer to continue using the prohibited substance for compelling reasons. It will (re)kindle his "desire to start consumption again" (Sandu, 2002: 10).

## 4. Research methodology

From a methodological perspective, our research involved, first of all, the use of the documentation method. In this regard, I consulted the sociological literature. It has been supplemented with certain information taken from the relevant legal databases. Then we used the qualitative methodology, based on the application of structured interviews to 14–18 year olds.

The research universe had as a target group 10 people from Iasi, aged between 14–18 years, consumers of prohibited substances, especially cannabis. They were convicted of crimes of illicit drug use, and are currently serving custodial sentences, being incarcerated in the Maximum Security Penitentiary of Iasi. The research was carried out in the municipality of Iasi, between April and May 2025. The interviews took place in public spaces (at the headquarters of the Iasi Bar Association, the Iasi Court, the Iasi Maximum Security Penitentiary). The meetings were established in advance with the agreement of the interviewees. The established place was intended to provide a comfortable and comfortable environment for asking the questions in the structured interview, so that the interviewees could answer unconstrained and unreserved. The confidentiality of the answers and the current ethical norms were respected.

## 5. Content analysis

From the previous research and from the answers of our interviewees, we conclude that the phenomenon of drug consumption among young delinquents in the city of Iasi is one of notoriety. With the increase in the number of consumers, a series of policies and measures must be identified to reduce the scourge among them. With the appearance of clubs and night terraces in the municipality of Iasi, drug traffickers also appeared. They illicitly sell prohibited substances to young people aged between 14 and 18. The main spaces where drugs are consumed are those in the crowded areas of Iasi: Palas Mall, the Tudor Vladimirescu and Titu Maiorescu university campuses, the nightclubs in the Cub, Center and Ciric areas. Consumption spaces (Chelcea, 2011: 773) become spaces for socialization. A favorable environment is installed here for the sale of drugs, for their consumption by young people who begin to discover the "flavor" of prohibited substances. Young consumers choose these spaces precisely to disperse into the crowd and be difficult to identify. They can buy their favorite drugs because

the suppliers are nearby, and the existing clubs and terraces offer them optimal spaces for the consumption of drugs and alcoholic beverages.

Generalizing, we can say that the current trends of young Romanians rally to some countries in Europe or in the American space. Thus, European fashion is also taken over by the Romanian consumer market, which is in full development. Another category of drug users are students on university campuses. In addition to cannabis use, they also sometimes resort to the use of high-risk drugs: cocaine, heroin or MDMA.

Another social category of drug users is made up of young delinquents. They choose abandoned homes and houses, disused land or abandoned buildings as consumption spaces, places where they are generally difficult to detect and identify. Consumption out of curiosity or fearfulness can lead to addiction and, subsequently, to involvement in criminal circuits. In the end, they are condemned. The young drug user will have specific behavioral and character traits. The social impact of drug use among young offenders is negative for society in general and deeply harmful for the user. Regarding the family involvement in stopping drug use by the young delinquents interviewed, we found in their answers clear references to an acute lack of involvement from parents and friends.

Following the administration of the interviews, young people aged 14–18 motivated the consumption of prohibited substances by recalling certain family crises that involved domestic violence, a state of family austerity, but also the harmful influence of some adult individuals. Of the ten interviewees, six confirmed drug addiction. The other four gave up drug use following therapies and specialized interventions, being reintegrated into society. They all show a high degree of awareness about illicit drug use and their harmful effects. They are interested in specialized intervention and help from family members.

### 6. Social consequences of drug use among young offenders

To a large extent, young drug users are engaged in criminal activities, which subsequently result in prosecution and legal measures specific to minors. In fact, the lack of family involvement in the deviant behavior of young delinquents leads to the amplification of the studied phenomenon. Finally, the harmful effects of illicit drug use lead to school dropouts, lower levels of education and a lack of a future in terms of professional qualifications. It is known that in today's Romanian society, illicit drug use among young people is constantly increasing. In this regard, the authorities and specialists continue to look for alternative solutions to combat and prevent illicit drug trafficking. It is also observed that the male population among young people is more prone than the female population (girls) to drug use. Thus, the category of young drug users, aged between 11 and 19, does not exceed 15% of the population (Ferréol, 1999: 180).

Other social consequences of illicit drug use among young offenders refer to unemployment and diminished social control; joining organized crime groups at national and international level; the lack of family ties, etc. That is why the possession of drugs for one's own consumption is prohibited and illegal. Public policies are needed to improve the phenomenon of drug use and addiction (Burrows, 2000: 36).

The phenomenon is much more widespread and sometimes has economic, political and religious connotations. There is a hidden international market for drug distribution, which generates various economic implications. At the very least, the sale

of prohibited substances leads to the financing of terrorist organizations (e.g. ISIS, Al Qaeda), which represents a great danger to the public order of democratic states.

### 7. Legal consequences of drug use among young offenders

As for the literature, specialists have divided points of view on how drug use is understood. Some of them are pro-consumption, others are counter-consumption (Ursan, 2017: 34). From ecstasy to identity crisis and addiction, the drug user travels a difficult path that leads him to become depressed, to have tendencies of refuge, with "fear of the aggressive acts of others..." (Abraham, 2005: 20). The cessation of drug use by young delinquents can be achieved by applying interventions at different stages of individual development and at multiple levels of society, at individual, legal and public responsibility (Svanberg, 2019: 125).

With the increase in illicit drug use in Romania, the need to legalize drugs as an alternative to criticism of consumers has been discussed by some institutions and organizations. This fact has generated a series of pollinators in the sense of continuing or stopping the repressive policies regarding the scourge of drugs (Ştefani, 2018: 200). Those who refuse the legalization of consumption recall that one of the main consequences of illicit drug consumption is the association of the phenomenon with organized crime. The relationship between the two is very close. Both involve violence and lead to the commission of crimes. The phenomenon manifests itself against the background of the socio-economic transition, but also of the current political changes in Romania. Drug use has increased significantly, mainly due to the fact that the free movement of citizens in Europe and the evolution of tourism favour the easy introduction of prohibited substances and their illicit distribution for illicit consumption or marketing (Elekes and Kovács, 2002: 166).

Today, illicit drug use in Romania is punished by the criminal law, so young drug offenders are subject to deprivation of liberty or non-custodial measures, depending on the seriousness of the crime for which they were sent to trial and subsequently convicted. Often, the courts apply to young primary offenders, aged between 14 and 18, punishments that are meant to lead to their correction and correction and to discourage illicit drug use.

### 8. Economic effects of illicit drug trafficking and consumption

In addition to the social, psychological and legal aspects of drug use among young delinquents, the literature also illustrates certain economic effects created by illicit drug use. In summary (Bălan, 2019), these effects refer to the creation of an "underground" drug economy. In it, addicted users, but lacking the material means necessary to buy drugs, end up being dominated by a feeling of insecurity. Their drama can be exacerbated by the unequal social distribution of sources of income and the constraints associated with this situation. Then, in the case of institutionalized therapy, the medical expenses with the treatments administered to illicit drug users can be assimilated to real economic costs. Specialists detail these costs by making concrete references to social assistance programs for the treatment and recovery of drug addicts, to the remuneration of staff and to the expenses with specific medication, administered within the treatment and recovery programs of drug addicts.

Other economic and financial expenses are allocated to events and projects carried out for the purpose of preventing and combating illicit drug trafficking and

consumption. Significant sums are sometimes distributed to pay the costs of paying border control/customs staff and detention staff for persons who have been convicted of offences related to drug trafficking and illicit use. Last but not least, significant amounts are also allocated to support the judicial system for monitoring drug traffickers, but also consumers.

## 9. Conclusions

We analyzed the sociological literature on drug use and completed the approach with the interview of ten young delinquents who consume prohibited substances in the municipality of Iasi. I then followed the passage through the known stages of drug use: ecstasy, identity crisis and state of addiction. Our research has also brought to the public attention the favorite places for drug consumption in the municipality of Iasi, the motivations for consumption and the relative awareness of the multiple consequences. We have also placed special emphasis in this study on highlighting the social, legal and economic consequences of drug use (Agheorghiesei, 2024: 24).

With all this in mind, we support the idea that there is a need to develop more effective social policies on illicit drug use. They must really come to the aid of young delinquents. Worthy of public attention and of the interest of specialists is also the idea of legal clarification of the possibility of legalizing certain types of drugs in Romania, for medical and recreational purposes. Perhaps in this way the illicit consumption of prohibited substances will be reduced. The idea had to be analyzed, with pluses and minuses, advantages and disadvantages. Moreover, before making a decision in this regard, we must also research the models of good practices in other Western countries.

We are aware that such an approach is not easy to achieve, given that drug use by young delinquents (and not only) is part of the category of social phenomena with particularly serious consequences. The multitude of causes that lead to illicit drug use is almost impossible to determine. On the other hand, the negative effects of drug use are very well known: physical, mental and social suffering; the economic collapses triggered and borne by the individual user of illicit drugs; (self-)stigmatization and social marginalization, etc.

We note that this increase in drug consumption is also manifested against the background of social crises, dramas caused by the breakdown of family ties and the dissolution of social cohesion, the disappearance of some jobs and, therefore, the increase in the unemployment rate. Drug use among young delinquents has major implications for them as individuals, for the family and for society as a whole. Through the collaboration of specialists and through the work in the multidisciplinary team, psychological, social and legal tools can be offered in the future to help young delinquents to remove addiction and integrate into society.

**References:**


1. Abraham, P. (2004). *Assistance and Rehabilitation of Drug Users: Hoop Method*. Bucharest: National.
2. Abraham, P. (2005). *The Drug Trap*. Bucharest: Detective.
3. Agheorghiesei, D. C. (2024). *European and Romanian Legislation on Preventing and Combating Drug Use*. Doctoral Report No. 2, Alexandru Ioan Cuza University of Iasi. Ph.D. supervisor: Prof. Nicu Gavriluță, Ph.D.
4. Bălan, M. (2019). Economic and Social Effects of Drug Consumption in Romania in a European Context. *Acta Universitatis George Bacovia. Juridica*, 8(1).
5. Burrows, D. (2000). *Starting and Managing Needle and Syringe Programs: A Guide for Central and Eastern Europe and the Newly Independent States of the Former Soviet Union*. IHRD.
6. Chelcea, L. (2011). In L. Vlăsceanu, *Sociology*. Iasi: Polirom.
7. Cusson, M. (1997). Deviance. In R. Boudon (ed.), *Treatise on Sociology*. Bucharest: Humanitas.
8. Elekes, Z., and Kovács, L. (2002). Old and New Drug Consumption Habits in Hungary, Romania and Moldova. *European Addiction Research*, 8(4), 166–169.
9. Ferréol, G. (1999). Adolescence et toxicomanie. In *Social Psychology*, Bulletin of the Laboratory "Psychology of the Social Field", no. 4, 180. Iasi: Polirom.
10. Gheorghe, T. (2018). *Psychological Aspects Regarding Drug Addictive Behaviors in Adolescents*. Bucharest: Eikon.
11. Howard, B. (1963). *Outsiders: Studies in the Sociology of Deviance*. New York: The Free Press.
12. Maslow, A. H. (1970). *Motivation and Personality*. New York: Harper & Row.
13. Merton, K. R. (1938). Social Structure and Anomie. *American Sociological Review*.
14. Merton, K. R. (1957). *Social Structure and Anomie*, revised and enlarged edition. New York: Free Press of Glencoe.
15. Rădoi, M. (2015). *Social Deviance in Young People: Substance Dependence*. Iasi: European Institute.
16. Rădulescu, M. S., and Dâmboeanu, C. (2006). *Sociology of Drug Consumption and Abuse*. Bucharest: Lumina Lex.
17. Rădulescu, S. (1998). *The Sociology of Deviance*. Bucharest: Victor.
18. Sandu, D. (2002). *Sociability in the Development Space*. Iasi: Polirom.
19. Schur, E. H. (1980). *The Politics of Deviance: Stigma Contests and the Uses of Power*. Prentice-Hall.
20. Svanberg, J. (2019). *Addiction Psychology of Addiction and Addictive Behavior*. Bucharest: Prior.
21. Ștefani, C. (2018). *Alcohol and Drug Consumption and Juvenile Delinquency*. Cluj-Napoca: Cluj University Press.
22. Ursan, M. (2017). *The Nightlife of Bucharest: Ethnographic Study*. Bucharest: Tritonic.
23. Williams, R. M. (1951). *American Society: A Sociological Interpretation*. New York: Knopf.

# International Standards and the Degree of Their Inclusion in the Educational Learning Process

**Lynda BENBESSAI**
National Institute for Research in Education (Algeria)
Email: lynda.benbessai@inre.dz

**Samir HAFFACI**
National Institute for Research in Education (Algeria)
Email: haffaci@yahoo.com

**Amine AMIMOUR**
University of Algiers 3 (Algeria)
Email: amineamimour@gmail.com

**Hamza ZERGUI**
National Institute for Research in Education (Algeria)
Email: hamza_1212@live.com

**Abdelhak GASMI**
National Institute for Research in Education (Algeria)
Email: abdelhakg@gmail.com

***Abstract:*** *This study examines the compliance of the first-grade primary mathematics textbook in Algeria with the Singapore and European Union standards. To achieve the objectives of the study, the content analysis method is used and two lists of standards for the first primary grade are set up using the Singapore Mathematics Syllabus and the Mathematics Syllabus of Schola Europaea. We found that the mathematics textbook for the first year of primary school met a low percentage of the standards considered, especially those of Singapore. We have also explored some aspects that can be useful for the enrichment of the Algerian mathematics textbook. Based on the study's results, we recommend addressing the expectations of the unmet standards in the areas of calculations, measurement, and problem-solving, to ensure partial compatibility, and to achieve global quality standards in the educational process. This analysis is one of the first studies that would open the field to other research and studies in various areas of mathematics curriculum development.*

***Keywords:*** *textbook; mathematics; Singapore standards; European Union standards; curriculum.*

## 1. Introduction

The right to education is a fundamental human right and a prerequisite for personal development, social participation, and equal opportunity. Its effective guarantee requires more than formal access to schools, as educational systems must also ensure quality, inclusion, non-discrimination, and learning conditions consistent with internationally recognized standards (Otovescu and Otovescu, 2022). From this perspective, the incorporation of international principles into the educational process represents an important means of aligning national practices with broader commitments concerning equity, accessibility, learner protection, and educational effectiveness.

Mathematics is a discipline that engages with the study of quantity, structure, change, and spatial patterns. Its conceptual foundations emerge through abstraction, deduction, and logical reasoning, all of which are deeply rooted in practical activities

like counting, measuring, calculating, and observing physical forms. Yet, despite its central role in cognitive and intellectual development, mathematics remains one of the most challenging subjects for students in formal education systems. Many learners struggle with its symbolic language and abstract reasoning, making the quality of curricular materials, particularly textbooks, especially consequential.

In most educational settings, mathematics textbooks function as a multifaceted resource: they guide teachers in lesson planning, support students in structured knowledge acquisition, and provide parents with a reference point for at-home learning. The pedagogical value of a given textbook depends not simply on the clarity of its explanations, but on its ability to orchestrate cognitive progression, scaffold conceptual understanding, and cultivate problem-solving skills in line with curricular goals. Research has repeatedly shown that textbooks are among the most influential artifacts in determining students' learning outcomes in mathematics (Afolabi, 2014: 140–151; Cheng and Sari, 2017: 235–251). Beyond content delivery, textbooks implicitly encode pedagogical norms and shape instructional decision-making: teachers tend to align their methods, pacing, and assessment strategies with the formats and assumptions embedded in the texts they use. Fan and Kaeley (2000, pp. 2–9) argue that differences in textbook design correlate with differences in classroom practice, indicating that curricular materials carry what might be called a "hidden pedagogy."

Despite this, systematic textbook analysis in Algeria—particularly in relation to international standards—remains limited. Much of the existing research on textbook quality in mathematics originates from educational systems that have institutionalised comparative analysis of teaching materials as a mechanism for quality assurance and reform. In countries like Singapore, Finland, and Japan, textbook evaluation is tied to broader curricular research programmes and subjected to rigorous international benchmarking. Lianghuo, Yan and Zhenzhen (2013, pp. 633–646) note that internationally, mathematics textbooks are often treated not merely as teaching aids but as central vehicles of the curriculum, shaping both what is taught and how it is taught.

Studies from Jordan, Saudi Arabia, and Palestine illustrate how structured content analysis can strengthen curriculum development. Rababah and Miqdadi (2016, pp. 251–262), for example, applied the National Council of Teachers of Mathematics (NCTM) standards to first-grade Jordanian textbooks and found a moderate level of compliance, prompting recommendations for extended, grade-specific studies. Similar work in Saudi Arabia by Alshehri and Ali (2016, pp. 137–142) concluded that grades 6–8 mathematics textbooks were highly aligned (96.3%) with NCTM standards, though gaps in early and late grades remained unexamined. Salha and Dwikat (2020, pp. 64–97), using Singapore's standards as the benchmark, found notable inconsistencies in second-grade Palestinian textbooks and called for a continuous monitoring strategy to ensure alignment. This growing body of research underscores the value of external benchmarking not as an imitative exercise, but as a reflective tool that allows national systems to interrogate their curricular practices.

It is against this backdrop that the present study analyzes the official Algerian mathematics textbook for the first year of primary school, published in its second-generation version in 2016. The focus on the first year is intentional: this stage constitutes the cognitive foundation upon which numeracy, symbolic reasoning, and

mathematical confidence develop. Deficiencies at this level have long-term consequences, as shown in longitudinal studies of school mathematics achievement and dropout patterns. The analysis compares the content and learning objectives of the Algerian textbook with those established in two international reference systems: the European Union framework (Schola Europaea, 2012) and the Singapore Ministry of Education syllabus (Ministry of Education Singapore, 2013).

Singapore was selected not only because it has maintained exceptionally high performance in international assessments such as TIMSS and PISA (Tin, Berinderjeet and Eng, 2019: 1–23), but also because its educational strategy is grounded in a deliberate investment in human capital—what former Prime Minister Lee Kuan Yew famously framed as the country's only true natural resource. The European Union framework, by contrast, offers a broader, plurilingual, and socially integrative model, positioned between North American reform mathematics and East Asian mastery-based approaches. In the latest TIMSS 2019 report, the EU's mean scores occupy a mid-to-upper tier range, allowing for a balanced comparative axis between high-performing and moderately-performing systems.

The purpose of this analysis is not to reproduce foreign models, but to identify structural convergences and mismatches that may inform future revisions of the Algerian mathematics curriculum. The hope is to stimulate institutional awareness among stakeholders responsible for textbook production, curricular policy, and teacher training, particularly at a moment when global competency metrics are playing an increasingly prominent role in educational planning.

The following sections present the study's methodological framework, data extraction procedures, and comparative findings, followed by a discussion that interprets these results in light of the selected standards. The article concludes with implications for national textbook policy and recommendations for further research, including the need for systematic analysis of all primary mathematics textbooks across grades, alignment with teacher training programmes, and a future exploration of how textbook design intersects with classroom reality.

## 2. Methodology

### 2.1 Study Population and Sample

The focus of this study is the official second-generation mathematics textbook used in Algeria for first-grade primary students. This textbook, published as part of the 2016 curriculum reform, represents the foundational material shaping early numeracy and arithmetic reasoning within the Algerian educational system. Given the pivotal role of first-grade mathematics instruction in establishing students' long-term mathematical proficiency, the textbook was selected as the exclusive unit of analysis.

### 2.2 Instrumentation and Analytical Framework

The comparative framework adopted in this study was developed on the basis of two internationally recognised curricular standards. The first derives from the mathematics curriculum approved for first grade by the Joint Teaching Committee of the European Schools during its meeting in Brussels on 13–14 October 2016 (Schola Europaea, 2012). The second originates from the official mathematics curriculum for first grade promulgated by the Ministry of Education of Singapore.

These two standards were operationalised into a set of major and secondary criteria, against which the content of the Algerian textbook was examined. An inferential frequency analysis was then conducted: for each criterion, the frequency (f) of appearance in the textbook was recorded and translated into a percentage (p), allowing for an estimation of the extent to which the textbook aligns with the European Union and Singaporean frameworks.

**Table 1: Frequencies and percentage of availability of the European Union standards in the textbooks**

| Main Standard | f | p | Secondary Standard | f |
|---|---|---|---|---|
| Numbers and the Number System | 137 | 0.54 | Understanding whole numbers | 96 |
| | | | Comparison and ranking | 35 |
| | | | Value of the investment | 06 |
| | | | Models and sequences | 00 |
| Calculation | 43 | 0.169 | Addition and subtraction | 43 |
| | | | Multiplication and division | 00 |
| Measures | 27 | 0.106 | Length and perimeter | 10 |
| | | | Time | 16 |
| | | | Money | 01 |
| Form and Space | 16 | 0.062 | 2-D shapes | 16 |
| Data Processing | 00 | 00 | Data collection, interpretation, and representation | 00 |
| Problem-Solving | 15 | 0.059 | Problem-solving | 15 |

**Table 2: Frequencies and percentage of availability of the Singapore standards in the textbooks**

| Main standards | f | p | Secondary standards | f |
|---|---|---|---|---|
| Numbers and the number system | 194 | 0.56 | Understanding whole numbers | 138 |
| | | | Comparison and ranking | 41 |
| | | | Value of the investment | 06 |
| | | | Fractions and decimal numbers | 07 |
| | | | Models and sequences | 02 |
| Calculation | 46 | 0.132 | Addition and subtraction | 46 |
| | | | Multiplication and division | 00 |
| Measures | 35 | 0.1 | Length and perimeter | 10 |
| | | | Area | 00 |
| | | | Capacity and volume | 00 |
| | | | Weight | 00 |
| | | | Time | 24 |
| | | | Money | 01 |
| Form and space | 39 | 0.112 | Spatial awareness, direction, and location | 23 |
| | | | 2-D and 3-D shapes | 16 |
| | | | Tessellation models | 00 |
| | | | Symmetry and transformations | 00 |
| Data processing | 00 | 00 | Data collection, interpretation and representation | 00 |
| Problem solving | 35 | 0.1 | Problem-solving | 35 |

The tables summarise the results of the quantitative content analysis, displaying the frequencies and percentage coverage of the major standards from the European Union and Singapore against the content of the Algerian first-grade mathematics textbook.

### 3. Results And Discussion

The analytical reading of Table 1 underscores the strong emphasis placed on the primary standard relating to numbers and the number system. Within this domain, the substandard of understanding whole numbers occupies a large segment of the textbook's content: pupils are guided through counting sequences, associating numbers with quantities, depicting them through visual representations, and contextualizing them in everyday settings. The inclusion of activities connected to the recognition of zero, the distinction between even and odd numbers, and the practice of reading and writing whole numbers from 0 to 40 suggests a pedagogical design cognizant of the foundational nature of number sense. It is in the acquisition of these skills—linking verbal counting to the written numeral, and both to concrete quantities—that learners begin to build the conceptual network underpinning mathematical reasoning.

However, this same substandard also reveals notable omissions. Estimating the number of items prior to counting, practicing number writing in multiples of ten up to 100, and decomposing and composing numbers up to 20 appear entirely absent. These neglected components may compromise the textbook's ability to nurture flexible numerical thinking. Similarly, in the substandard dedicated to comparing and ordering numbers, one observes a partial adherence: while vocabulary such as "greater than," "less than," and ordinal terms from first to tenth is introduced, the methodological choice to rely on grids or pavements instead of number lines limits learners' exposure to a linear and scalable representation of quantity.

Other substandards reveal similar patterns of partial compliance. Positional value, for example, is touched upon through the use of tens and units tables, yet lacks the manipulation of base-10 materials that typically facilitate embodied understanding. Fractions and decimals are approached only through the vocabulary of halves, doubles, and quarters, without any engagement with the inverse relation between doubling and halving. The fifth substandard—concerning numerical patterns and sequences—is nearly absent, save a brief mention of counting by twos, fives, and tens up to 100. One has to conclude that the textbook prioritizes basic counting and symbolic representation, while overlooking higher-order numerical structures that scaffold later mathematical learning.

By contrast, the main standard of calculation is treated with less prominence. The introductory treatment of addition and subtraction is consistent with many early numeracy curricula: children engage with concrete manipulatives, mathematical vocabulary, and simple operations within 20. Yet, instead of reinforcing the conceptual relationship between addition and subtraction or exploring fundamental properties like commutativity, the book unexpectedly elevates formal notation up to sums of 100—a puzzling demand given the developmental level of the learners. There is also no mention of guided exploration of fact families or inverse operations, both of which are instrumentally useful in helping children generalize arithmetic relationships. Multiplication and division are altogether absent, which is particularly surprising given

the international trend toward introducing these concepts in playful, intuitive formats even in early grades.

Turning to measurement, which accounts for 10 percent of the standards addressed in the textbook, the focus lies almost exclusively on length and time. This emphasis is pedagogically justified: as Brousseau (1986) suggests, activities involving comparison and measurement of magnitudes are foundational in early mathematics, bridging the gap between concrete perceptual experience and abstract numerical reasoning. Nonetheless, the textbook devotes only a single instance to the vocabulary of length, and while it introduces non-standard units and the ruler, it fails to acquaint pupils with important practices such as choosing appropriate units or recognizing standard measures (meter, centimeter). Entire subdomains of measurement—area, capacity, volume, and weight—are absent, depriving learners of entry points into later, more abstract mathematical terrains.

The treatment of shape and space fares slightly better, occupying over 11 percent of the framework. Spatial awareness is relatively well represented through vocabulary and directional language, though pupils are not invited to explore their own classroom or playground, depriving them of personally meaningful spatial anchors. The subsection on two- and three-dimensional shapes does incorporate recognition and drawing tasks, but tactile construction (e.g., with blocks or tangrams) is missing, along with any engagement with symmetry or tessellation—elements crucial to the geometry strand of early mathematics.

Problem-solving, despite being allocated 10 percent of the standards, is largely reduced to routine one-step tasks. The textbook misses the opportunity to develop representational fluency or metacognitive strategies, nor does it encourage peer discussion that might expose children to divergent approaches. The complete absence of data handling—collecting, interpreting, and representing information—is particularly problematic, as it neglects a growing international emphasis on statistical literacy from the early years.

A similar diagnostic approach can be applied to Table 2, which compares the Algerian textbook with the Singaporean model. Here again, whole numbers absorb the lion's share of curricular space. The Singaporean approach, however, distinguishes itself through structured use of concrete materials, participatory games, and visual tools designed to support conceptual clarity. Techniques like number bonds and dot cards are not simply supplementary but central to building relational understanding. The comparative and ordering substandard is similarly enhanced through manipulatives like base-10 blocks, whereas positional value is anchored in place-value charts and grouping activities. Such methods enable learners not just to perform tasks, but to internalize the logic underlying the number system.

In the calculation domain, Singapore's method systematically interweaves conceptual meaning with procedural fluency. Before formal algorithms are taught, children work with concrete objects, story problems, and group collaborations—scaffolding that the Algerian textbook largely bypasses. Multiplication and division, absent in the Algerian case, are introduced early in Singapore through grouping and sharing activities, aligning with research that stresses the developmental continuity between repeated addition and multiplicative reasoning.

Measurement and geometry in Singaporean curricula are likewise anchored in active manipulation and cross-modal representation, while the treatment of time,

money, and other phenomena is filtered through real-life applications. Data handling is introduced through project-based tasks that cultivate not only mathematical skills but also collaborative and communicative competencies.

One immediately notices that group work is a consistent feature of the Singaporean method, not an optional supplement. This is pedagogically consequential: collaborative tasks nurture verbalization, enhance peer learning, and cultivate social and cognitive skills that bear directly on mathematical dispositions. Moreover, the use of playful problem-solving—such as card games, number stories, and bar models—positions mathematics not as a collection of static rules but as a dynamic method for making sense of the world.

In comparing the two systems, the most salient difference is not the breadth of content but the depth and quality of its treatment. The Algerian textbook covers many surface aspects of early numeracy, but often sacrifices structured conceptual development in favor of procedural form. The Singaporean approach, by contrast, deliberately narrows its initial focus to deepen understanding, trusting that durable conceptual structures will support later learning in a more sustainable way.

This contrast raises a broader pedagogical question: is it more effective to expose learners to many mathematical ideas early on, or to cultivate profound understanding of a smaller set of core concepts? The Singaporean example seems to suggest the latter.

## 4. Conclusion

This study undertook a systematic comparison between the first-grade Algerian mathematics textbook and the learning standards established for the same grade level in two internationally recognized systems: Singapore and the European Union. The findings indicate that the Algerian textbook aligns with only a modest proportion of the competencies defined by either framework. This disparity is especially pronounced in the domains of calculation, measurement, and problem-solving—areas widely recognized as foundational for conceptual and procedural fluency in mathematics (Fan & Kaeley, 2000; Lianghuo et al., 2013).

The comparative analysis not only exposed gaps in content coverage but also revealed a lack of methodological depth and developmental scaffolding. For instance, the textbook offers limited opportunities for active manipulation of mathematical concepts, collaborative exploration, or the guided use of visual representations—strategies that Singapore's curriculum deliberately integrates to foster durable mathematical understanding (Tin et al., 2019). Likewise, the European model's emphasis on progressive competencies, cross-curricular applications, and the gradual introduction of abstract reasoning appears largely absent in the Algerian setting (Schola Europaea, 2012).

It appears therefore that any reform aiming at international compatibility must go beyond superficial alignment with lists of standards. It should instead engage with the underlying pedagogical models that have informed successful mathematics programs elsewhere. This includes prioritizing conceptual understanding over early formalism, integrating problem-solving and inquiry-based learning from the outset,

and broadening the lens of mathematical activity to include data handling, spatial reasoning, and mathematical communication.

In light of these observations, we propose three broad recommendations:

– The Algerian first-grade textbook should be revised to address key conceptual absences in arithmetic, measurement, and problem-solving, ensuring at least partial harmony with the core competencies emphasized in both the Singaporean and EU models.

– A subsequent comparative analysis should be extended to the mathematics textbook for the second grade, enabling a longitudinal perspective on curricular coherence and progression.

– Future research might usefully incorporate additional benchmarks such as the NCTM standards, which have informed mathematics education reform across a variety of educational systems and remain a point of global reference.

This comparative study represents an initial step toward situating Algerian mathematics education within a wider international conversation. As a pioneering effort in this research space, it may serve as a catalyst for deeper inquiry—whether into textbook design, classroom practice, or the broader question of how global standards can be contextualized in local educational systems without sacrificing pedagogical integrity.

**References:**

1. Afolabi, S. S. (2014). Mathematics textbook analysis: A study on recommended mathematics textbooks in school use in southwestern states of Nigeria. European Scientific Journal, 1, 140–151.
2. Alshehri and Ali. (2016). The compatibility of developed mathematics textbooks' content in Saudi Arabia (grades 6–8) with NCTM standards. Journal of Education and Practice, 7(2), 137–142.
3. Brousseau, G. (1986). Théorisation des phénomènes d'enseignement des mathématiques. PhD thesis. Université Sciences et Technologies – Bordeaux I.
4. Cheng, C. C., and Sari, M. S. (2017). A review and content analysis of mathematics textbooks in educational research. Problems of Education in the 21st Century, 75(3), 235–251.
5. Fan, L. H., and Kaeley, G. S. (2000). The influence of textbooks on teaching strategies: An empirical study. Mid-Western Educational Researcher, 13, 2–9.
6. Lianghuo, F., Yan, Z., and Zhenzhen, M. (2013). Textbook research in mathematics education: Development status and directions. ZDM Mathematics Education, 45, 633–646.
7. Ministry of Education Singapore. (2013). Singapore Mathematics Syllabus: Primary One to Six – 2013. Available at: https://www.moe.gov.sg/media/files/primary/mathematics_syllabus_primary_1_to_6.pdf?la=en&hash=B401E761C0BFC490279883CCE4826924CD455F97.
8. Otovescu, C., Otovescu, A., and Toderici, O. F. (2022). Romanian Education in an European Context: Strategic Objectives, Elite Performances and Functional Deficiecies. *Revista Universitară de Sociologie*, XVIII(3), 35–45.

8. Rababah, E., and Miqdadi, R. (2016). An analysis of Jordan's adherence to the NCTM standards for first-grade reformed mathematics textbooks. Jordan Journal of Educational Sciences, 13(2), 251–262.
9. Salha and Dwikat. (2020). Analysis of the second-grade mathematics textbook in light of Singapore's standards. International Academic Journal in Educational and Psychological Sciences, 1(2), 64–97.
10. Schola Europaea. (2012). Mathematics Syllabus—Primary Cycle (P1–P5). Brussels: Office of the Secretary-General of the European Schools, Pedagogical Development Unit. Available at: https://www.eursc.eu/Syllabuses/2012-01-D-20-en-4.pdf (accessed 15 July 2021).
11. TIMSS. (2019). U.S. Highlights Web Report (NCES 2021-021). U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics. Available at: https://nces.ed.gov/timss/results19/index.asp.
12. Tin, L. T., Berinderjeet, K., and Eng, G. Tay. (2019). Mathematics education in Singapore. In Mathematics Education – An Asian Perspective. Singapore: Springer Nature Singapore, 1–23.

# The Company Car as an Institutionalized Privilege: A Sociological Perspective on Occupational Inequalities

**Iulian NEGRU**
PhD Student, University of Bucharest (Romania)
Email: iulian.negru104@mail.com

***Abstract****: In the context of a dynamic society based on mobility, performance and flexibility, the article analyzes the perception of inequality and inequity associated with differentiated access to mobility resources within organizations in the case of the distribution of company cars and free parking spaces. I considered that mobility inequalities are not simple side effects of employment relationships, but exclusion mechanisms that shape participation in organizational life, aiming to highlight the reality of these inequalities according to the perceptions recorded by the respondents. The research was carried out using a self-administered Google Forms questionnaire, randomly sent through the snowball method to a sample of 172 employees in Bucharest. The responses show that access to mobility resources offered by the organization (company car, free parking space) is unevenly distributed, indicating internal stratifications of the organizational body. Preliminary findings show that the use of company cars and the allocation of free parking spaces can be associated as micro-politics of power stratification. The analysis suggests that these practices reinforce internal hierarchies and symbolic differentiations, highlighting the need for organizational policies that promote equity.*

***Keywords:*** *Company car; occupational inequalities; symbolic differentiations; mobility; employment relationships.*

## 1. Introduction

I considered that the differentiated distribution of company cars, as well as the differentiated access of various categories of employees to occupying, free of charge during working hours, the parking spaces provided by the employer, often constitute genuine forms of exclusion. Alongside with Kaufmann (2017), I consider both company cars and free parking spaces represent a form of capital available to the employer. Unequal distributions of resources within labor relations are indisputable social realities, justified by the principle of efficient use of these resources for the purpose of achieving organizational objectives. Previous studies (Tipping, 1968; Holley, Jain, Lyons, 2008) have distinguished between the situation in which the car is used as a means of production and situations in which cars are provided to employees as additional benefits. If the situation of using the company car as work equipment, exclusively for the purpose of performing the job, does not raise issues regarding work ethics, the case of company cars raises questions about the fairness of this social practice. The literature (Metzler, Humpe, Gössling, 2019) has analyzed these inequities that arise in the relationships of work benefits resulting from the distribution of differences. The way in which the use of company cars influences the travel behaviors of users and their families (Metzler, Humpe, Gössling, 2019) has been studied, but less attention has been paid to how labor relations are influenced in this context of unequal treatment. The differentiated access of employees to the free parking spaces owned by the employer has been analyzed in the literature, but only as a secondary aspect alongside the provision of a company car as a benefit. Studies on the unequal distribution of mobility resources have neglected the differentiated access of employees to the free parking spaces owned by the employer in analyzing the sources

that generate psycho-moral inequity at the workplace, instead focusing mainly on distributive and normative inequity concerning the right to obtain a parking space.

## 2. Literature Review

Historical evidence from the Romanian communist system shows that access to a work car and driver formed part of a broader package of institutionally administered advantages reserved for political elites. This illustrates how access to an automobile may become embedded in organizational structures as a visible marker of hierarchy and privilege (Betea & Cioacă, 2022: 257).

In labor relations, the exercise of mobility is imposed on the employee, who cannot choose to work elsewhere or in a manner other than that agreed with the employer through the employment contract. European legislation and national regulations recognize these mobility imperatives and regulate working time, including various forms of social protection for workers during their commute along the usual route from home to the workplace and back. Analyzing these normative realities in social worlds related to work, it is observed that significant importance is given to ensuring a fair division between free time and working time in relationships between employees and employers (Tipping, 1968; Holley, Jain, Lyons, 2008) and the sharing of work-related commuting risks accidents and all associated risks. Within organizations, alongside hierarchical order segments, there are unequal and sometimes unfair distributions of mobility resources (Börjesson, Roberts, 2023).

Romanians were affected by the scarcity of automobiles, which continued along with the scarcity of means to secure them, as in many other former socialist countries (Pojani, et al., 2018). Employers became aware of the transactional value of their own mobility resources in labor relations and used them discretionarily within the power relations they hold over their own employees (De Borger, Wuyts, 2011; Holley, Jain, Lyons, 2008). The differentiated treatment by the employer has not been sufficiently investigated as a routine practice and in terms of the effects generated by unequal or unfair treatment experienced daily. In contrast, these studies show that those who use public transport have longer average commuting times, as do those who are forced to search for a parking space and these aspects of inequality are accompanied by inequities generated by the benefits of using company cars (Börjesson, Roberts, 2023; Metzler, Humpe, Gössling, 2019; De Borger, Wuyts, 2011; Maharjan, Janatabadi, Ermagun, 2024). The company car, as well as the parking permit, become, precisely through unequal or unfair treatment, sources of differentiation and social status (Urry, 2006; Fitt, 2023).

## 3. Methods

This article is the result of an exploratory, investigative, and descriptive approach and is based on a research project that surveyed the perceptions of workers of Bucharest, Romania, regarding the accessibility of mobility in the case of automobile use. I define automobility at work in this article as the totality of mobility opportunities to and from the workplace, as well as for work purposes by means of a motor vehicle, whether it is owned by the worker or by the employer, as long as it is used free of charge by the employee, including opportunities for parking these automobiles at the workplace. When analyzing automobility at work, I considered opportunities for the permanent and free use of the car by the employee, including for personal purposes, even by members of their families, as well as opportunities for use during working

hours for work purposes. I define automobility resources as the totality of mobility opportunities offered free of charge to employees by employers, either in the sense of using a car, or in the sense of free use of a parking space, or through the combination of these opportunities. Automobility in the workplace conceptually integrates the distribution of automobility means available to the worker as benefits granted by the employer, even if this transfer of mobility is not formally acknowledged or defined as a benefit, and no formal procedures for calculating and taxing the resulting additional income for beneficiary employees are carried out or reported.

### 3.1. Hypotheses

The practice of offering a company car as a benefit or incentive, sometimes from the recruitment phase, is a common procedure, being an aspect that employees take into account when assessing their personal situation in the employment relationship. In addition, I have observed that a very important aspect for employees is access to the employer's parking spaces. Noting that not all employees have equal access to these spaces, but often, access to parking is achieved in relation to hierarchical position. At the same time, those who own company cars generally have priority in occupying the employer's parking spaces compared to those who use personal cars. I considered that the observed aspects raise issues of material and symbolic inequity and inequality, which leads me to assume the hypothesis of differentiated access in the exercise of the profession.

### 3.2. Research Questions

Taking into account the assumptions mentioned, the following questions were formulated: What is the perception of workers regarding the fairness of the free distribution of a company car at the workplace? What is the perception of workers regarding the fairness of the free distribution of access to a parking space at the workplace? How do gender and level of education influence perceptions regarding the distribution of mobility resources at the workplace?

### 3.3. Data Description

The data were collected using a Google Forms questionnaire distributed randomly through the snowball method. A total of 172 responses were received, which addressed participants' perceptions regarding the three perspectives referred to in the research questions. The sample was not one of convenience and that there was no interference by the researcher in the selection of this sample. At the moment of the deadline for completing the responses, it was found that the sample consisted of 56.4% men and 43.6% women. The resulting sample, composed of 82% university graduates and only 18% high school graduates, did not include responses from those who had completed only primary or secondary education or individuals without any formal education. This aspect once again shows the limits of using the snowball method, popular in qualitative research, as highlighted by the literature (Parker, Scott, Geddes, 2019; Beauchemin, González-Ferrer, 2011), and should be taken into account when interpreting the results.

### 3.4. Research Stages

The first stage of the research consisted of the researcher's participatory observation in their own experiences of labor relations and generated the main framework of the definitions of the concepts involved in the research. The second stage, consisting of a content analysis of the literature on social relations subsequent to the use of company vehicles, partially overlapped with the observation activities. The research instrument was generated in this context. The third stage began with data collection and analysis, with the drafting of conclusions and this article representing the stage that concluded this research endeavor.

## 4. Results

Within the set of questions related to workplace mobility, respondents were asked to assess whether using a car for work is a necessity. 66.9% declared strong or at least moderate agreement with this statement. Through this question, we gauged the perception of the utility and necessity of a car for work-related travel. Considering the importance attributed to the opportunity to use a car for commuting to work as a foundation of the research, we measured perceptions related to inequalities and inequities in the procedures for distributing mobility resources. Following the application of the questionnaire, it was found that: 57.4% had neither a company car nor a free parking space; 8.8% of respondents had a company car; 28.9% had a free parking space; 1.5% had both a company car and a parking space. In 0.7% of cases, the respondent was the entrepreneur themselves, which led to the exclusion of their responses from the analysis. The fact that for 57.4% of respondents, their employers did not provide mobility resources, with these employees having neither a company car nor a parking space, may seem like a large figure, but this must be viewed with caution because there are significant differences depending on gender and level of education. For the analysis of the results, it was considered that among the 39.2% of respondents who benefit in various forms from the distribution of mobility resources, a distinction must be made between the company car as a benefit and the company car as a work tool. We assumed that a large part of the responses from high school graduates and a significant portion of those with higher education who declared that they own a company car consider the company car to be an indispensable tool for performing work, such as delivery or transporting certain categories of products, or frequent travel to carry out specific tasks. For this reason, we analyzed these results by comparison with responses given to other questions and with the level of education declared by each respondent. To obtain an overall picture of respondents' perception of the car as necessary for their work activity, we asked respondents to indicate to what extent the car is necessary for their work. 48.1% mentioned strong agreement, 18.8% expressed moderate agreement, 7.8% were rather inclined to disagree, and only 3.9% stated that they are categorically in disagree with the statement that a car is necessary for work. Therefore, 33.1% of respondents are not convinced that the car is necessary for their own work. Considering also the fact that 57.4% of respondents did not receive mobility resources, we found that one in four employees (24.3%) may be subject to unfair practices in the distribution of these resources, with previous studies classifying them as benefits (Metzler, Humpe, Gössling, 2019; Andreassen, 2019). The aim of this study was to understand and present respondents' perceptions in mobility-related relationships with the employer, by examining responses regarding the possession of

these categories of benefits, which were complementary to responses related to the degree of satisfaction felt in the relationship with the employer in relation to the support provided for exercising the right to mobility. Within the set of questions related to the degree of satisfaction, we focused on the perception regarding the level of satisfaction with the employer's distribution of mobility resources, as well as the perception regarding satisfaction with the relationship with coworkers with whom they compete for sharing the employer's mobility resources. Access to resources has been analyzed in the literature (Yeh, 2015), especially resources necessary for carrying out, facilitating, or easing work, which are considered important factors in job satisfaction (Sewell, Gilbert, 2015; Lekić, et al., 2019). In the case of commuters, access to a company car brings a significant change in terms of travel costs (De Borger, Wuyts, 2011), time costs, travel conditions, and even, in certain forms, physical safety, especially when it would otherwise be necessary to walk in isolated areas or places that could be harmful. We assumed that the accessibility of a company car and access to a free parking space may be a factor influencing job satisfaction (Sewell, Gilbert, 2015) as well as overall life satisfaction, as recorded by several studies (Judge, Watanabe, 1993; Rain, Lane, Steiner, 1991; Rice, Near, Hunt, 1980). On the other hand, we considered that the degree of satisfaction may also be affected by the scarcity of resources (Inoue, Kawakami, 2010), regardless of whether it is justified, generated by employer practice, or by competition from other colleagues for insufficient resources within a general context of economic scarcity. Other studies have shown that the lack of resources in the workplace can go beyond simple dissatisfaction, being even correlated with anxiety (Cohidon, et al., 2010; Battams, et al., 2014). Alongside other researchers (Oshagbemi, 2000; Henderson, Argyle, 1985; Neuberger, 1996), I considered the perception of satisfaction regarding the fairness and honesty of coworkers' behaviors in relation to competition for sharing the employer's mobility resources to be very important. I consider that the degree of satisfaction experienced in the relationship with coworkers (Oshagbemi, 2000) is an important indicator in evaluating competition for the distribution of mobility resources. The results show a slightly increased level of satisfaction in relationships with colleagues: 37.7% declared themselves very satisfied, 10% satisfied, 34.6% neither satisfied nor dissatisfied, 4.6% dissatisfied, and 13.1% very dissatisfied. Gender has been identified as a significant factor in the processes of distributing the employer's mobility resources, both in terms of collegial relationships (Neuberger, 1996) and as a source of unequal treatment (Ridgeway, 1997; Kalev, Deutsch, 2018). The results showed that the degree of satisfaction related to the distribution of mobility resources is fairly balanced in relation to gender, both in relation to the employer and in relation to colleagues. However, the number of cases of respondents with high school education who reported owning employer-provided mobility resources is proportionally much lower. Therefore, respondents with high school education accept to a greater extent the inequity and inequality in the sharing of these resources, often considering their hierarchical position as lower. Previous studies have highlighted situations of inequity and the consequences generated in behaviors at the individual level (Taris et al., 2001) as well as at the organizational level (Torraco, 2018; Sim, Jeong, 2025). Without underestimating the positive role of worker education in organizations and in access to key positions within the organization, we examined the mobility inequities experienced by respondents in unequal situations within their organizational

relationships, particularly in real competition for parking spaces. Another dimension analyzed was the presence of feelings of frustration or anxiety in relation to the mobility resources available within the geographic area where the workplace is located. Respondents were asked to estimate the balance between the number of parking spaces available and the actual parking demand in the neighborhood where they work. 40% answered that there are no parking spaces, neither free nor paid; 50% answered that parking spaces are insufficient, especially on certain days and during peak hours; 85% expressed strong or moderate disagreement with the hypothesis that the number of parking spaces is balanced in relation to the average demand in the neighborhood where they work. The scarcity of parking resources at the workplace, combined with the lack of parking spaces in the surrounding area, contributes to the lengthening of commuting times. The unpredictability of finding a parking solution leads to uncertainties regarding the actual duration of the trip and creates circumstances that increase stress levels. An employee who does not benefit from mobility resources provided by the employer is forced to spend more time searching for available parking spaces. If, during this commute in a personal car, the employee observes that there are free parking spaces reserved for other employees but is obliged to ignore them to comply with formal or informal rules prioritizing their use for colleagues, they experience feelings of frustration and anxiety (Battams et al., 2014). These feelings are not directed only toward the employer for the differentiated allocation of resources but also toward colleagues who benefit from these priorities (Inoue, Kawakami, 2010; Cohidon et al., 2010). It should be emphasized that very often these coworkers occupy higher hierarchical positions, receive higher remuneration, and often have flexible working schedules, and thus are not subjected to the stress of arriving at the workplace at a specific time. Considering that parking accessibility is an important factor in understanding social realities and perceptions of inequality (Piasna, Drahokoupil, 2017) and inequity in the distribution of access-to-work resources, respondents were asked to indicate the average time they allocate daily to finding a parking space in the work context: 34.4% reported allocating less than 15 minutes; 14.3% allocate between 15 and 30 minutes; 19.5% responded that they prefer to drive only occasionally; 31.2% responded that they prefer to pay the necessary fee at the nearest parking space, increasing the economic gap for all those in these situations compared to their peers who benefit parking from free. Such expenses, consisting of fuel payments, parking fees, and even extended travel time to find a parking opportunity, exacerbate discrepancies and can be a source of conflict (Inoue, Kawakami, 2010). Analyzing the individual responses to the questions regarding the mobility benefit received from the employer and the average time allocated to searching for a parking space, we found that there is no uniform pattern. It can be assumed that many of those who declare allocating a longer daily interval, 60 minutes, undertake multiple work trips during a regular workday.

## 5. Discussion

The results highlighted a complex picture of perceptions regarding access to automobility, depicting a diverse positioning of responses in workplace mobility depending on a set of factors, only some of which were surveyed in this study. Because a larger group of employees often competed for access to limited resources, it was necessary to explore perceptions related to these relationships with regard to the

degree of satisfaction experienced in the relationship with coworkers with whom they compete for the distribution of mobility resources. We requested responses related to the perceived degree of satisfaction and asked respondents to answer two aspects: the relationship with the employer in relation to the support provided for exercising the right to mobility; the relationship with coworkers who participate in the competition for sharing mobility resources. Additionally, we analyzed the general trends resulting from the responses of the entire sample regarding the fairness of the free distribution of a company car and access to a parking space. Given that only 38.9% stated that mobility resources were distributed to them (9.4% of respondents have a company car, and 29.5% have a secured free parking space), we found that there is a minority of 15% who, although they do not benefit from any positive measure, declare themselves fairly satisfied with this situation. At the same time, 31% of respondents are dissatisfied (9.8% of respondents declared themselves dissatisfied and 21.2% very dissatisfied) with the manner in which they are excluded from the distribution of these resources. Investigating the tensions reflected in interpersonal relationships at the workplace, the responses showed that 47.7% of respondents are rather satisfied with the negotiation relations regarding these mobility resources with other colleagues. However, 17.7% exhibit anxiety related to the behavior of colleagues concerning the sharing of these resources.

Regarding the results recorded on the question related to the perception of the fairness of the free distribution of a company car, the answers to the first two questions which show that: 15% of those without a parking space are satisfied with the relationship with the employer regarding the distribution of mobility resources; 47% of those without a parking space are dissatisfied with the relationship with the employer regarding the distribution of mobility resources; 27% are satisfied and 27% are dissatisfied with the relationship with colleagues in sharing the resources. The data shows that the majority of respondents who do not have access to mobility resources consider the manner of sharing these resources to be inequitable. Their dissatisfaction is directed mainly at the employer; however, more than one in four workers are also dissatisfied with relationships with colleagues, suggesting that such inequities can be a source of conflict (Inoue, Kawakami, 2010). In addition, 25% those who declared that they benefit from a company car reported that are very dissatisfied with the conditions provided, and 16.6% of them are dissatisfied with the way these resources are shared with other colleagues. The car was often seen as a source of distinction and social status (Gartman, 2004; Sheller, Urry, 2000; Alam, 2020), and the analysis of the responses highlighted a certain degree of dissatisfaction even among respondents who have access to mobility resources, but with some nuances. Thus, employees benefiting from both a company car and a parking space declared themselves unanimously satisfied with relationships with colleagues, but they mentioned a more moderate degree of satisfaction regarding the resources provided by the employer. Many of these forms of dissatisfaction can be explained by theories of social status, distinction, and membership in an elite group (Alam, 2020; Veblen, 2017) respondents being dissatisfied with the age, model, or equipment of the cars provided by the employer, either in comparison with other colleagues or in relation to the social prestige associated with the feeling of being cared for. Employees who benefit from a company car but not from a parking space report higher degrees of dissatisfaction than those who benefit from both facilities. Regarding the results recorded on the question related

to workers' perception of the fairness of the free distribution of access to a parking space at the workplace. Workers who have a free company parking space reported, surprisingly, higher degrees of satisfaction at 78% compared to 58% of those who benefit from a company car. In addition, only 7.3% of them declared themselves dissatisfied or very dissatisfied with the support provided by the employer, and only 5% expressed dissatisfaction regarding the sharing of these resources with other colleagues. This fact highlights the attention that must be given to the fairness of parking access, because this resource is less related to the production process, and thus to the workplace hierarchy, and affects self-esteem more. Differential treatment may contradict the messages embedded in organizational culture and in the stated values of organizations, messages that speak about teamwork under conditions of respect and fairness. Regarding the results recorded on the question related to the influence of gender and education level on perceptions regarding the distribution of mobility resources at the workplace. According to the assumptions made in the third research question, we analyzed the general trends resulting from the responses allocated by response categories, evaluating separately the answers provided by respondents according to gender and in relation to the level of education. Mobility resources are also mediated in relation to professional training and the number of years of education. We found that 92% are university graduates and only 8% are high school graduates noting that the sample from which the study was conducted is unbalanced in favor of those with university education. Regarding the gender composition of those who benefit from a company car, we found that only 16.6% are women and 83.33% are men, which demonstrates that even in terms of gender balance regarding gender balance, namely access to privileged positions and shared resources, there are still substantial imbalances in the labor market in Bucharest. In addition, the responses provided by women regarding their satisfaction in social relationships resulting from the sharing of resources showed that they are dissatisfied with relationships with other colleagues and rather dissatisfied with the conditions offered by the employer. The degree of satisfaction in relation to the level of education showed that professional training influences this indicator, with respondents with higher education being on average more satisfied than those with high school education, both among women and men. In the case of high school graduates, male and female respondents reported the same rates of satisfaction in their relationship with the employer and with other colleagues. Female respondents with higher education reported slightly higher rates of satisfaction, but this indicator must be correlated with the fact that only 16.6% of female respondents have a company car or a parking space. This extremely small percentage places the respondents in an elite class of which they are aware (Gartman, 2004; Latimer, Munro, 2006), which influenced their responses.

## 6. Conclusions

I started from the assumption that mobility inequalities are not just secondary effects of employment relationships, but exclusion mechanisms that shape participation in organizational life. The results obtained do not fully confirm this hypothesis, but demonstrate the existence of disparities that can, in some cases, have effects of segregation, socio-professional isolation, acceleration of internal workplace conflicts. The emergence of exclusion in the workplace is, therefore, mediated by previous incidents. The study confirmed that there are categories of employees who

are more disadvantaged both by the internal procedures of organizations and by everyday practices regarding the sharing and access to mobility resources of employees. The hypothesis that the level of education is a significant factor in these disparities was confirmed. The study suggests that the company car is a privilege that has entered deeply into the organizational culture, being incorporated through formal mechanisms, recognized by the internal norms of some employers or by practices established over time. The company car is institutionalized through the effects produced at the cognitive, cultural and affective level of each individual who accepts these rules of distribution of the employer's mobility capital together with the other norms and practices within the organizational culture in which they work, their internalization having consequences at the subjective, identity level. This conclusion is imposed by the large number of respondents who declare themselves satisfied (18% of those who have neither a parking space nor a company car and 78% of those who only have a parking space) with the situation of access to motorization. In addition, 33.1% of respondents are not convinced that the car is necessary for their own work, which may indicate an association and acceptance of these mechanisms of unequal distribution of mobility capital, integrated into the organizational culture. Thus, this study highlights a significant social problem that has been insufficiently investigated, suggesting that the positioning of the company car as an institutionalized privilege is achieved by integrating, at a subjective level, negotiation mechanisms between employees and employers that can be sources of inequity. The results also highlighted that access to employer parking spaces is perceived by employees as a factor that generates a high degree of satisfaction, with these respondents reporting a satisfaction of 78% regarding the relationship with the employer and 80% in relations with other colleagues, significantly higher than the satisfaction of 58% reported by respondents who own company cars. This aspect has not been previously found in other research and suggests that the equitable distribution of mobility resources requires not only equal access to company cars but also to parking spaces. The results proved that perceived fairness in the workplace and ethical leadership in the equitable distribution of mobility resources have a significant impact on satisfaction rates with the employer as has been found by other authors (Adekanmbi, Ukpere, 2022; Tuli, Gupta, Singh, 2023). However, perceived inequity in relation to mobility practices adopted or agreed by the employer affects employee satisfaction and in relations with colleagues, which suggests the perception of behaviors lacking politeness, empathy or solidarity in the competition for parking at the workplace. The employer plays the role of mediator in these situations because practices perceived as unfair can even indirectly affect work withdrawal behaviors (Gupta, S., Sharma, Gupta, A., 2025). There are imbalances in the distribution of mobility resources in relation to the level of education, proven by the answers provided by female respondents regarding their satisfaction with the social relations resulting from the sharing of these resources, which showed that they receive mobility resources to a lesser extent, but accept this inequality. This study opened a theme that requires further investigation through qualitative studies, considering the method of interpretative focus groups (Redman-MacLaren, Mills, Tommbe, 2014; Favero, Heath, 2012) as a technical solution that can help generate coherently substantiated explanations and practical suggestions aimed at reducing disparities and blocking the mechanisms that generate social inequity and inequality in employment relations.

## 7. Limitations

The sample of 172 respondents is very small, being obtained through the snowball method and unbalanced in terms of the ratio between respondents with higher education (82%) and those with high school education (18%). There are arguments that could attest to the existence of selection errors that can distort the results. Therefore, the results of this study must be interpreted taking into account these limitations. Validation through further studies is necessary.

## References:


1. Adekanmbi, F. P., & Ukpere, W. I. (2022). Perceived workplace fairness, ethical leadership, demographics, and ethical behaviors. *Journal of Governance and Regulation*, 11(2). https://doi.org/10.22495/jgrv11i2siart4
2. Alam, Y. (2020). *Race, taste, class and cars: Culture, meaning and identity*. Policy Press https://doi.org/10.46692/9781447353485
3. Andreassen, G. L., Halse, A. H. (2024). Company cars and household car choices. *Transportation Research Part D: Transport and Environment*, 135, 104384. https://doi.org/10.1016/j.trd.2024.104384
4. Battams, S., Roche, A. M., Fischer, J. A., Lee, N. K., Cameron, J., Kostadinov, V. (2014). Workplace risk factors for anxiety and depression in male-dominated industries: A systematic review. *Health Psychology and Behavioral Medicine: An Open Access Journal*, 2(1), 983-1008. https://doi.org/10.1080/21642850.2014.954579
5. Beauchemin, C., & González-Ferrer, A. (2011). Sampling international migrants with origin-based snowballing method: New evidence on biases and limitations. *Demographic Research*, 25, 103-134. https://doi.org/10.4054/DemRes.2011.25.3
6. Betea, L., and Cioacă, V. O. (2022). Prestige Making Techniques: The Case of Elena Ceauşescu. *Revista Universitară de Sociologie*, 18(3), 254–266.
7. Börjesson, M., Roberts, C. (2023). The impact of company cars on car ownership. *Transportation Research Part A: Policy and Practice*, 176, 103803. https://doi.org/10.1016/j.tra.2023.103803
8. Cohidon, C., Santin, G., Imbernon, E., Goldberg, M. (2010). Working conditions and depressive symptoms in the 2003 decennial health survey: The role of the occupational category. *Social Psychiatry and Psychiatric Epidemiology*, 45(12), 1135-1147. https://doi.org/10.1007/s00127-009-0157-7
9. De Borger, B., Wuyts, B. (2011). The tax treatment of company cars, commuting and optimal congestion taxes. *Transportation Research Part B: Methodological*, 45(10), 1527-1544. https://doi.org/10.1016/j.trb.2011.06.002
10. Favero, L. W., Heath, R. G. (2012). Generational perspectives in the workplace: Interpreting the discourses that constitute women's struggle to balance work and life. *The Journal of Business Communication*, 49(4), 332-356. https://doi.org/10.1177/0021943612456037
11. Fitt, H. (2023). The status of being or the achievement of becoming? Towards better understandings of cars as status symbols. *Social & Cultural Geography*, 24(6), 968-986. https://doi.org/10.1080/14649365.2021.2000014
12. Gartman, D. (2004). Three ages of the automobile: The cultural logics of the car. *Theory, Culture & Society*, 21(4-5), 169-195. https://doi.org/10.1177/0263276404046066

13. Gupta, S., Sharma, R., & Gupta, A. (2025). Cultivating workplace fairness: the ripple effect of organizational justice on work withdrawal, incivility as the mediator. *International Journal of Law and Management*, 67(2), 271-281. https://doi.org/10.1108/IJLMA-03-2024-0080
14. Henderson, M., Argyle, M. (1985). Social support by four categories of work colleagues: Relationships between activities, stress and satisfaction. *Journal of Organizational Behavior*, 6(3), 229-239. https://doi.org/10.1002/job.4030060306
15. Holley, D., Jain, J., Lyons, G. (2008). Understanding business travel time and its place in the working day. *Time & Society*, 17(1), 27-46. https://doi.org/10.1177/0961463X07086308
16. Inoue, A., Kawakami, N. (2010). Interpersonal conflict and depression among Japanese workers with high or low socioeconomic status. *Social Science & Medicine*, 71(1), 173-180. https://doi.org/10.1016/j.socscimed.2010.02.047
17. Judge, T. A., Watanabe, S. (1993). Another look at the job satisfaction-life satisfaction relationship. *Journal of Applied Psychology*, 78(6), 939-948. https://doi.org/10.1037/0021-9010.78.6.939
18. Kalev, A., Deutsch, G. (2018). Gender inequality and workplace organizations: Understanding reproduction and change. In *Handbook of the Sociology of Gender* (pp. 257-269). https://doi.org/10.1007/978-3-319-76333-0_19
19. Kaufmann, V. (2017). *Re-thinking mobility: Contemporary sociology*. Routledge. https://doi.org/10.4324/9781315244303
20. Latimer, J., Munro, R. (2006). Driving the social. *The Sociological Review*, 54(1_suppl), 32-53. https://doi.org/10.1111/j.1467-954X.2006.00636.x
21. Lekić, N., Vapa-Tankosić, J., Rajaković-Mijailović, J., Lekić, S. (2019). An analysis of factors influencing employee job satisfaction in a public sector. *E a M: Ekonomie a Management*, 22(3), 83-99. https://doi.org/10.15240/tul/001/2019-3-006
22. Maharjan, S., Janatabadi, F., Ermagun, A. (2024). Spatial inequity of transit and automobile access gap across America for underserved populations. *Transportation Research Record*, 2678(1), 674-690. https://doi.org/10.1177/03611981231171914
23. Metzler, D., Humpe, A., Gössling, S. (2019). Is it time to abolish company car benefits? An analysis of transport behaviour in Germany and implications for climate change. *Climate Policy*, 19(5), 542-555. https://doi.org/10.1080/14693062.2018.1533446
24. Neuberger, O. (1996). Relationships between colleagues. In *The diversity of human relationships* (pp. 269-288). https://doi.org/10.1017/CBO9780511586552.013
25. Oshagbemi, T. (2000). Satisfaction with co-workers' behaviour. *Employee Relations*, 22(1), 88-106. https://doi.org/10.1108/01425450010310815
26. Parker, C., Scott, S., & Geddes, A. (2019). Snowball sampling. *SAGE research methods foundations*. https://doi.org/10.4135/9781526421036831710
27. Piasna, A., Drahokoupil, J. (2017). Gender inequalities in the new world of work. *Transfer: European Review of Labour and Research*, 23(3), 313-332. https://doi.org/10.1177/1024258917713839
28. Pojani, E., Van Acker, V., Pojani, D. (2018). Cars as a status symbol: Youth attitudes toward sustainable transport in a post-socialist city. *Transportation Research Part F: Traffic Psychology and Behaviour*, 58, 210-227. https://doi.org/10.1016/j.trf.2018.06.003

29. Rain, J. S., Lane, I. M., Steiner, D. D. (1991). A current look at the job satisfaction/life satisfaction relationship. *Human Relations*, 44(3), 287-307. https://doi.org/10.1177/001872679104400305
30. Redman-MacLaren, M., Mills, J., Tommbe, R. (2014). Interpretive focus groups: A participatory method for interpreting and extending secondary analysis of qualitative data. *Global Health Action*, 7(1), 25214. https://doi.org/10.3402/gha.v7.25214
31. Rice, R. W., Near, J. P., Hunt, R. G. (1980). The job-satisfaction/life-satisfaction relationship: A review of empirical research. *Basic and Applied Social Psychology*, 1(1), 37-64. https://doi.org/10.1207/s15324834basp0101_4
32. Ridgeway, C. L. (1997). Interaction and the conservation of gender inequality: Considering employment. *American Sociological Review*, 62, 218-235. https://doi.org/10.2307/2657301
33. Sewell, B. B., Gilbert, C. (2015). What makes access services staff happy? A job satisfaction survey. *Journal of Access Services*, 12(3-4), 47-74. https://doi.org/10.1080/15367967.2015.1061435
34. Sheller, M., Urry, J. (2000). The city and the car. *International Journal of Urban and Regional Research*, 24(4), 737-757. https://doi.org/10.1111/1468-2427.00276
35. Sim, E., Jeong, S. (2025). Examining the impact of inequitable work distribution on faculty job satisfaction: A hierarchical linear modeling. *European Journal of Training and Development*. https://doi.org/10.1108/EJTD-08-2024-0115
36. Taris, T. W., Peeters, M. C., Le Blanc, P. M., Schreurs, P. J., Schaufeli, W. B. (2001). From inequity to burnout: The role of job stress. *Journal of Occupational Health Psychology*, 6(4), 303-323. https://doi.org/10.1037/1076-8998.6.4.303
37. Tipping, D. G. (1968). Time savings in transport studies. *The Economic Journal*, 78(312), 843-854. https://doi.org/10.2307/2229181
38. Torraco, R. (2018). Economic inequality, educational inequity, and reduced career opportunity: A self-perpetuating cycle? *New Horizons in Adult Education and Human Resource Development*, 30(1), 19-29. https://doi.org/10.1002/nha3.20206
39. Tuli, N., Gupta, N., & Singh, H. P. (2023). Illuminating Fairness: A comprehensive review of workplace equity sensitivity. *GLIMS Journal of Management Review and Transformation*, 2(2). https://doi.org/10.1177/jmrt.231212055
40. Urry, J. (2006). Inhabiting the car. *The Sociological Review*, 54(1_suppl), 17-31. https://doi.org/10.1111/j.1467-954X.2006.00635.x
41. Veblen, T. (2017). *The theory of the leisure class*. Routledge. https://doi.org/10.4324/9781315135373
42. Yeh, H. J. (2015). Job demands, job resources, and job satisfaction in East Asia. *Social Indicators Research*, 121(1), 47-60. https://doi.org/10.1007/s11205-014-0631-9

# Socialization as a Mechanism of the Child's Social Construction in the Era of Globalization

**Mohammed DHIB**
Lecturer B, Laboratory for Studies on Violence and Trauma in Algerian Society
Department of Sociology, Faculty of Social and Human Sciences,
Mohamed Chérif Messaadia University, Souk Ahras (Algeria)
Email: m.dhib@univ-soukahras.dz

**Bouras FAISSAL**
Lecturer A, Social Development and Community Service Laboratory
Department of Sociology, Faculty of Social and Human Sciences,
University of El Oued (Algeria)
Email: bouras-faissal@univ-eloued.dz

***Abstract**: There is a broad consensus that the process of socialization constitutes the primary and fundamental process that has accompanied humanity since the emergence of the earliest human communities up to the present day. It has contributed to preserving the continuity and stability of society, as it represents an indispensable process and set of efforts aimed at preparing individuals and ensuring their sound and balanced social development in accordance with the core values and norms of the group. Consequently, socialization has served as a mechanism for preserving the customs, traditions, and social characteristics of society. The process of constructing the individual socially is a complex and dynamic one, shaped by multiple political, economic, social, cultural, and technological factors, particularly within contemporary societies. In today's world, cultures have become increasingly interconnected, while spatial and temporal boundaries have diminished, transforming the world into what Marshall McLuhan described as a "global village." As a result, discourse has moved beyond simple societies toward engaging with the realities of globalization societies. The significance of socialization and its role for both the individual and society constitute the central focus of this research paper, which seeks to highlight socialization as a mechanism of social construction in the era of globalization through a theoretical approach that traces this process from simple societies to globalization societies.*

***Keywords**: Socialization; Social Construction; Globalization; Cultural Globalization; Socialization Institutions.*

## 1. Introduction

"Man is by nature a social and communicative being" is a statement first emphasized by the Greek philosopher Aristotle and later reaffirmed by the Arab founder of sociology, Ibn Khaldun. This statement reflects the nature of human beings, who inherently tend to live within groups and cannot exist independently from society, as they seek security, stability, self-defense, cooperation, and social interaction. However, the integration of individuals into social groups can only be achieved through a sound process of socialization aimed at shaping individuals and equipping them with the culture, values, norms, and ethics of the community.

Contemporary reality confirms the transition from simple societies to societies characterized by technology and digitalization, where the effects of technology, globalization, social media, and virtual communities have become evident across political, economic, social, and cultural domains, particularly in relation to social relations and the social construction of individuals. Whereas in the past the family was often assigned primary responsibility and blamed for the spread of certain social

deviations and deviant behaviors that violated moral values and social norms, today there is a growing tendency to defend and support the family in light of societies increasingly dominated by traditional and digital media and communication technologies.

Through this brief discussion, we seek to shed light on socialization as a mechanism of the individual's social construction, while tracing its evolution from simple societies to globalization societies shaped by Western culture and modern media and communication technologies.

## 2. Study Objectives

This study aims to achieve a set of objectives, namely:

- To define the key concepts related to socialization, social construction, and globalization, and to clarify their theoretical interrelationships within the framework of educational sociology.
- To analyze the role of socialization institutions (family, school, peer group, and media) in shaping the child's social construction in light of the transformations brought about by globalization.
- To examine the impact of cultural and technological globalization on the process of socialization and its implications for the child's values, identity, and social behaviors.
- To propose a scientific perspective on addressing contemporary challenges posed by globalization to socialization, through strengthening cultural identity and achieving a balance between authenticity and openness.

## 3. Significance of the Study

The scientific importance of this topic lies in highlighting the relationship between socialization and the child's social construction in the context of globalization. It contributes to understanding the impact of cultural and technological transformations on identity formation and behavior, and provides a theoretical framework for analyzing the role of social institutions in shaping the individual within a changing and globalized society.

## 4. Study Concepts

### 4.1. Socialization

According to sociologists such as Émile Durkheim, John Dewey, and Karl Mannheim, socialization refers to all the processes and efforts undertaken by social institutions such as the family and the school, which contribute to developing the individual's intellectual, cognitive, and moral capacities (Moumeni, 2000: 251).

- Socialization (social adaptation) is the process through which the individual transforms from a biological being into a social being.
- Socialization is a process of social learning through which the individual responds and interacts with society, acquiring its norms, values, and customs in order to become accepted within the community and capable of performing various social roles throughout the different stages of life (Meshri, n.d.: 30).
- According to Dr. Hamid Abdessalam Zahran, socialization is a process of learning, teaching, and education based on social interaction, aimed at enabling the individual, throughout the stages of life, to acquire a set of behaviors, norms, and

attitudes necessary for performing specific social roles, thereby facilitating adaptation and social integration (Shroukh, 2004: 57).

- It is also defined as a continuous learning process through which the individual acquires social and cultural values, norms, and skills in order to become an integrated member of society.

#### 4.1.1. Operational Definition

Based on the above definitions, socialization can be operationally defined as the social process and collective efforts undertaken by a set of social systems and institutions to shape and construct the individual socially, enabling them to adapt and conform to the group and society.

### 4.2. Social Construction

Social construction is considered one of the fundamental concepts discussed by the pioneers of sociology and anthropology. Perspectives differed regarding the use of this concept among thinkers such as Auguste Comte, Montesquieu, and A. R. Radcliffe-Brown. Auguste Comte employed the term within the framework of his holistic perspective when addressing social statics, through which he referred to the overall social system (Hamed, 2008: 21). According to this understanding, social construction for Comte signifies a set of interconnected systems and substructures linked through various roles and functions that complement one another, where the survival of the whole depends on the relationships among these parts and their functions (Bouhriq, 2017: 400).

As for Montesquieu, he used the concept of social construction to refer to political and economic systems, religion, customs, traditions, art, and morality, all of which enable an understanding of the laws governing society.

Similarly, A. R. Radcliffe-Brown adopted an anthropological perspective close to that of Montesquieu, emphasizing social relationships in his study of social construction. In his view, social construction represents the totality of relationships, norms, ethics, and values that regulate and control behavior during social interaction (Hamid, 2008: 21). Thus, social construction consists of political, religious, and cultural systems, in addition to customs, traditions, and social norms formed over long historical periods (Bouhriq, 2017: 400).

From this perspective, it becomes evident that, for early anthropologists, social construction was closely linked to socialization and its various components as part of an integrated whole. Therefore, it is difficult to separate these two concepts, as they should rather be viewed as two sides of the same coin. It is impossible to speak about socialization without referring to construction, and social construction may indeed be considered both synonymous with and the outcome of the socialization process.

#### 4.2.1. Operational Definition of the Individual's Social Construction

The individual's social construction refers to the final outcome of the socialization process. It represents the ultimate product and cumulative result of socialization efforts once they succeed in forming the individual's personal identity, shaping behavior, enabling the acquisition of social roles, and developing the capacity to interact with others in accordance with the culture and values of society.

### 4.3. Globalization

Numerous definitions have been proposed for the concept of globalization, reflecting the diversity of academic studies and disciplinary perspectives through which it has been examined. The concept has been adopted within political, economic, social, and cultural fields, each addressing globalization from its own perspective and according to its specific implications.

- In the economic field, globalization refers to the phenomenon of market dominance, interdependence, and integration of production systems through the flow of capital and foreign trade, the liberalization of markets, technological advancement, and the expansion of foreign investment (Al-Rawashdeh, 2007: 22).
- In the political field, globalization is perceived as a system that transcends the nation, the state, and the homeland, while contributing to the weakening of affiliations related to tribe, sect, and ideological fanaticism through the fragmentation, dispersion, and diminishing authority of the state and national identity.
- In the social field, globalization is viewed as a phenomenon characterized by the shrinking of the world and the growing interconnectedness among societies, accompanied by the elimination of barriers and distances through the development of shared awareness among individuals and communities (Bouras, 2019: 210–211).

It has also been described as a new imaginary vision anticipating the emergence of a single global society or an interconnected social whole that transcends the boundaries of nation-states (Shafiq Abdul Latif and Abdel Majeed, 2008: 79).

- In the cultural field, globalization is regarded as a set of global commodities and cultural products capable of being marketed and transferred from one place to another. It is further understood as a process of cultural unification and the creation of a single global society through the marginalization of traditional cultures and their replacement with a dominant modern culture grounded in a materialistic philosophy of life (Bouras, 2019: 211).

### 4.4. Cultural Globalization

Some may assume that cultural globalization is merely a process of cultural exchange based on the principles of absolute freedom and equal opportunities among states and societies in accessing communication technologies and media tools. However, reality suggests otherwise. Cultural globalization is often viewed as a phenomenon of domination exercised by advanced Western countries that possess superiority in the field of media and communication. Through this dominance, such countries seek to protect themselves from the influence of Arab and Islamic cultures while simultaneously distorting the image of Islam and Muslims.

- Cultural globalization refers to the transformation of national and ethnic culture into a new global culture (Al-Omari, 1432/1433 H: 74).
- It is also defined as the attempt of a particular society to universalize its cultural model across the world and to control civilizational concepts, values, and behavioral patterns through the use of various means, most notably media and communication technologies (Bouras, 2019: 234).
- Mohammed Abed al-Jabri defines cultural globalization as an act of cultural appropriation and symbolic aggression against other cultures.

- Mohamed Shaaban describes cultural globalization as an intellectual and civilizational domination that advocates the erasure and cultural exclusion of the "other," leaving a single dominant culture—namely American imperial culture—to prevail (Al-Sharifin, 2010: 440).

#### 4.4.1. Operational Definition of Cultural Globalization

Operationally, the researcher defines cultural globalization, also referred to as cultural modeling, as an inevitable and involuntary cultural phenomenon aimed at erasing and marginalizing the culture of the "other," particularly the cultures of weaker nations, including their morals, values, behaviors, and modes of thought, while promoting the adoption of Western culture.

## 5. The Relationship Between Socialization and the Individual's Social Construction

Socialization cannot be separated from social construction, as socialization is an intentional transformative process carried out by social institutions and media agencies to transfer and transform the individual from a biological being into a social individual. Social construction, on the other hand, represents the final outcome of this process once it succeeds in shaping a balanced individual who is socially integrated and compatible with the norms and values of society.

### 5.1. Socialization as a Process of Formation

Socialization is considered the primary means of constructing the individual socially through processes of social formation carried out by social institutions and by both face-to-face and virtual communicative environments. These environments create a context of social interaction through which society's values, norms, and rules are transmitted to the individual (Taaba, 2017: 97).

### 5.2. Social Construction as an Outcome

This process results in the formation of an integrated social personality for the individual. Through it, the individual becomes capable of adapting to the surrounding environment, learning and performing social roles, and developing a sense of responsibility toward both oneself and others.

### 5.3. Mutual Influence

Socialization is not a one-way process; rather, it is a dynamic interaction. The individual is not merely a passive recipient of values, but also influences and is influenced throughout the socialization process. For example, an individual's behavior affects the responses and practices of those responsible for socializing them, such as the family and the school.

### 5.4. Negative Effects

Incorrect methods of socialization, such as authoritarianism, neglect, or overprotection, may lead to a disturbed social construction of the individual. This can negatively affect their personality, making them unable to adapt to society or achieve success.

## 6. Main Institutions of Socialization

### 6.1. The Family

The family is defined by Albert Agbrern as a social bond between a married couple with or without children, or a single parent with children.

George Peter Murdock, on the other hand, defines the family as a social group consisting of at least a man and a woman and one child, sharing a common residence, characterized by cooperation and a socially recognized sexual relationship between the parents.

The family is considered the first social unit in which the child develops. It protects and nurtures the child and satisfies their physical, emotional, moral, religious, intellectual, social, aesthetic, and national needs. It is the institution that embraces the child and provides them with the skills, attitudes, and values prevailing in their society.

### 6.2. The School

The school is an institution established by society with the aim of socializing individuals through education and instruction, and ensuring their physical, intellectual, social, psychological, spiritual, and moral development (Shroukh, 2004: 64–79).

### 6.3. Peer Group

Peer groups, also referred to as "the society that captivates the hearts of its members," are described as a spontaneous social group that is not formally organized and does not follow fixed rules, traditions, or logical regulations (Taaba, 2017: 202). This means that peer groups are small social units formed to meet psychological and social needs, with which the child interacts continuously. They may take the form of play groups or student groups.

The child's membership in peer groups fulfills several functions:

- Channeling (physical regulation): It helps in directing physical energy, improving fitness, and relieving stress and emotional repression.
- **Exploration:** Play serves as a tool for educators to identify behavioral or psychological disturbances in the child and address them.
- **Skill development:** Skills emerge through interaction with peers.
- **Compensation:** Play helps relieve tension and psychological pressure, restoring emotional balance.
- **Social interaction:** The child learns proper interaction with others and appropriate self-expression within social contexts.

In general, peer groups play a major role in the social construction of the child by forming new social norms, developing psychological attitudes, supporting independence, providing opportunities for experimentation, and satisfying individual needs (Shroukh, 2004: 80–81).

### 6.4. Media and Communication

Media and communication tools are considered among the most important social institutions involved in the process of socialization. Their significance lies in their strong attractiveness and influential power over audiences, as well as their ability to reshape and restructure many concepts, values, and attitudes, both positively and negatively, particularly among children.

There is a clear relationship between children and media, especially television, which is regarded as one of the primary sources that children rely on for imitation and modeling after the family (Al-Hudhaif, 1998: 22).

### 7. Functions of Socialization as a Mechanism of the Individual's Social Construction

Socialization is considered one of the processes through which culture is transmitted via learning, imitation, and observation, as the child acquires the prevailing customs, traditions, attitudes, and values within their social environment. Through the process of socialization and cultural adaptation, individuals acquire their humanity and their personalities are shaped in accordance with the group that serves as their reference framework. Consequently, social cohesion is achieved, along with processes of social regulation and guidance exercised by social systems, values, and norms over behavior, ensuring social harmony and the continuity of society.

The functions of socialization and educational processes are broad, encompassing religious, social, family, political, environmental, artistic, and even military education, with the aim of developing children's awareness through appropriate methods (Rashwan, n.d.: 170). Among the most important functions and mechanisms of socialization that lead to cultural and social adaptation are:

- **Cultural transmission:** Socialization is the primary channel for transmitting society's culture from one generation to another, including language, customs, traditions, and values.
- **Formation of self and identity:** Through interaction with others, the individual learns social expectations and develops a sense of self and social identity.
- **Development of social skills:** The individual acquires the necessary skills for social interaction, such as self-control, responsibility, and adherence to group rules and values.
- **Adaptation to the environment:** Socialization helps individuals adapt to their surrounding environment—whether family, school, or peer groups—ensuring their integration into society.
- Social normalization (role internalization): The individual learns the behavioral norms associated with different social roles such as student, employee, or parent, ensuring behavior aligns with societal expectations. In this regard, a Libyan researcher notes that socialization provides individuals with social norms and social statuses that vary according to age, gender, and occupation, and it also equips them with the social roles imposed by their position (Al-Mabrouk Salem, 2023: 121).

### 8. Mechanisms of the Individual's Social Construction

William Lambert, in his book Social Psychology, identifies a set of mechanisms through which the social individual is formed. These mechanisms operate across different social contexts, including the family, peer play groups, school, and media. They include the following processes:

- **Observation and imitation:** Observation is a process in which the child directs their sense of sight toward surrounding behaviors. It leads naturally to imitation, through which the child reproduces the behaviors of others with whom they have strong and direct relationships, such as parents, teachers, and friends, as

well as media figures such as cartoon or animated characters. This imitation often occurs unconsciously and unintentionally. In this regard, studies by Michael Cole emphasize the importance of observation in learning processes more than situations where information is transmitted verbally.

• **Identification:** This refers to the unconscious and unintentional imitation of the behavior of a model or reference group.

• **Direct instruction:** This is one of the social learning methods that begins within the family, where the child learns names, what should be done, and what should be avoided. This process operates alongside observation and imitation.

• **Social control:** This refers to monitoring and guiding individual behavior in accordance with the culture of society, including its values, norms, and ethics.

• **Reward and punishment:** Winfred Hill highlights in his discussion of conscience that moral behavior can be shaped through reward and punishment. Socialization agents use rewards and reinforcement to encourage desirable behaviors, while undesirable behaviors are discouraged through punishment, with emphasis on ensuring that punishment is constructive rather than harmful (Lambert and Lambert, 1993: 49–67).

## 9. How Can the Effects of Globalization and Cultural Globalization on Socialization Be Addressed?

• **Benefiting from the positive aspects:** The scientific and intellectual progress associated with globalization can be utilized to develop individuals and societies, rather than focusing solely on its negative effects.

• **Role integration:** The family and other social institutions should work together in the process of socialization to build a coherent identity for individuals in the face of contemporary challenges.

• **Countering negative consumption:** Young people should be guided toward the positive use of technology and media, while encouraging critical thinking skills.

• **Preserving cultural identity:** Families and communities should work to strengthen local cultural values and raise awareness among new generations about the importance of their cultural identity.

## 10. Conclusion

Addressing the phenomenon of globalization and cultural globalization reveals a fundamental reality: this phenomenon, with the changes it has brought about in values, norms, behaviors, relationships, and social roles within social systems, is either a culturally imposed model on weaker nations and societies, or an unavoidable reality that must be engaged with in order to keep pace with global development and progress. This requires the formulation of well-studied and intelligent strategies and plans to preserve the cultural identity of Arab and Muslim societies.

The exclusion of traditional and digital media, as well as virtual interactions, from society and the neglect of their role in all aspects of life—particularly their role in socialization as a mechanism of individual social construction—has become impossible. Therefore, it is necessary to adapt these tools, benefit from their positive aspects, and at the same time avoid and mitigate their negative effects.

## 11. Recommendations and Guidelines

• It is necessary to continuously alert parents to monitor their children's use of media, communication tools, and digital technologies, as well as the programs and content they are exposed to.

• Parents should be encouraged and made aware of the importance of reducing the amount of time their children spend using digital technologies and social media platforms.

• The role of families and schools should be strengthened and reinforced through awareness campaigns, local media programs, radio broadcasts, as well as academic forums, conferences, and other educational events.

## References:


1. Al-Hudhaif, Mohamed Ben Abderrahman. (1998). *How Media Influences: A Study in Theories and Methods.* Riyadh: Obeikan Library.
2. Al-Mabrouk Salem, Ibrahim Miftah. (2023). *The Social Effects of Digital Media and Communication Technology on Child Socialization.* Journal of Bani Walid University for Humanities and Applied Sciences, 30.
3. Al-Omari, Machi Ben Sahab Ben Ali. (1432/1433 H). *The Role of Educational Institutions in Facing Some Aspects of Globalization from an Islamic Educational Perspective.* Unpublished master's thesis, College of Education, Umm Al-Qura University, Saudi Arabia.
4. Al-Rawashdeh, Alaa Zohair Abdul-Jawad. (2007). *Globalization and Society.* Amman: Dar Al-Hamid.
5. Al-Sharifin, Imad Abdullah. (2010). *Cultural Globalization from an Islamic Educational Perspective.* Journal of Sharia and Law Studies, 37(2).
6. Bouhriq, Karima. (2017). *The Algerian Amazigh Social Structure: A Socio-Anthropological Perspective.* Journal of Humanities Sciences, 48.
7. Bouras, Fayçal. (2019). *Mass Communication and Its Role in Cultural Change in Society in the Era of Globalization.* Faculty of Social and Human Sciences, University of Biskra, Algeria.
8. Hamid, Khaled. (2008). *Introduction to Sociology.* Algeria: Dar Jisour for Publishing and Distribution.
9. Lambert, William W., and Wallace E. Lambert. (1993). *Social Psychology.* Translated by Salwa Al-Mulla, 2nd ed. Cairo: Dar Al-Shorouk.
10. Meshri, Soulef. (n.d.). *Introduction to Educational Sciences.* University Reference Book Series. Ben Aknoun: Office of University Publications.
11. Rashwan, Hussein Abdul-Hamid Ahmed. (n.d.). *Education and Society: A Study in the Sociology of Education.* Alexandria: Arab Modern Office.
12. Shafiq Abdul Latif, Wajdi, and Mohamed Said Abdel Majeed. (2008). *Globalization and Social Change: A Follow-up Study of "The Silent Voices".* Arab Journal of Sociology, 1.
13. Shroukh, Salah Eddine. (2004). *Educational Sociology.* Algeria: Dar Al-Ouloum for Publishing and Distribution.
14. Taaba, Souad. (2017). *Socialization and Its Role in Directing Some Individuals Toward Deviant Behavior Such as Witchcraft.* Journal of Social Sciences Development, 13.

# Democratic Backsliding in Contemporary Societies: Theories, Mechanisms, and Conceptual Controversies

**Vlad Ovidiu CIOACĂ**
PhD, Doctoral School of Social and Human Sciences,
University of Craiova (Romania),
E-mail: cioacavladovidiu@gmail.com

**Dorin Cosmin VASILE**
PhD, Doctoral School of Social and Human Sciences,
University of Craiova (Romania),
E-mail: cosminsile@yahoo.com

***Abstract***: *This article reviews the literature on democratic backsliding, understood as the gradual, state-led erosion of the institutions and norms that sustain an existing democracy. Its aim is to map the theoretical traditions, the causal mechanisms and the conceptual disputes that structure a fast-growing field at the meeting point of political sociology and comparative politics. The method is a structured synthesis of classical and contemporary scholarship, in which recent accounts of democratic decline are read against the sociological tradition. The article argues that what distinguishes twenty-first-century backsliding is its gradual and legalistic character: elected incumbents dismantle constraints on power through ostensibly lawful means rather than through coups. It sets out three mechanisms, namely executive aggrandizement and autocratic legalism, anti-pluralist populism, and polarization, and places them within an international order shaped by the conduct of great powers. Classical sociology, in particular Weber on legitimate domination, Pareto on the circulation of elites and Spengler on decline, is shown to anticipate much of the current debate while also marking its characteristic risks. The article concludes that backsliding remains a contested concept, exposed to over-extension and to a bias toward decline, but still analytically necessary, and that clarifying its boundaries against autocratization and de-democratization is a condition for cumulative research.*

***Keywords:*** *democratic backsliding; autocratization; populism; legitimate domination; political sociology*

## 1. Introduction

The claim that democracy is in decline has moved from academic journals into general political commentary with unusual speed. For several decades after the mid-1970s, the spread and consolidation of democracy was widely treated as the dominant direction of political change. That reading no longer holds. Since roughly the mid-2000s a large body of work has documented a reversal, and its central observation is that the process is now typically slow and hard to see. Twentieth-century democracies usually failed through abrupt seizures of power; their twenty-first-century counterparts are more often weakened over time by elected leaders acting within the letter of the law (Bermeo, 2016; Levitsky and Ziblatt, 2018). The development has acquired a label, democratic backsliding, and a substantial but still unsettled research literature.

This matters beyond the study of political institutions themselves. Political activity occupies a leading position among the domains of social life, setting much of the framework within which economic, cultural and civic activity take place (Otovescu, 2021: 26). When democratic institutions weaken, the effects are not contained within the political system; they alter the terms on which social life as a whole is conducted. The urgency of recent scholarship reflects this, and so does its terminological disorder, since the available vocabulary was largely built to describe coups and revolutions rather than slow institutional attrition.

The article reviews this literature with three purposes. The first is to reconstruct the main theoretical traditions through which backsliding has been interpreted, and to show that a debate conducted largely in comparative politics and constitutional law gains from being placed alongside classical sociology. The second is to separate the question of why democracies become vulnerable from the question of how they are actually dismantled, and to set out the mechanisms involved. The third is to examine the conceptual disputes that continue to divide the field, including the objection that the term backsliding carries an unwarranted assumption of decline. The discussion draws on around two dozen classical and contemporary works chosen for their influence on, or their bearing upon, the sociology of democratic erosion.

The remainder is organized as follows. Section 2 clarifies the conceptions of democracy that any account of decline presupposes and situates backsliding within a crowded terminological field. Section 3 turns to the classical sociological foundations, reading Weber, Pareto and Spengler as anticipations of, and correctives to, the current debate. Section 4 surveys contemporary theories, and Section 5 disaggregates the mechanisms of erosion. Section 6 addresses the conceptual controversies, after which the conclusion draws the argument together.

## 2. Conceptualizing Democracy and Its Erosion

Any claim about decline presupposes a standard against which the decline is measured. A good deal of the disagreement in the literature turns out to depend on which conception of democracy is in play, so it is worth making the alternatives explicit before proceeding.

### 2.1. Minimalist and embedded conceptions of democracy

The minimalist or procedural tradition, descended from Schumpeter and given its canonical form by Dahl (1971), treats democracy as a method for filling public offices through competition for the popular vote. Dahl's notion of polyarchy rests on two dimensions, contestation and inclusiveness, operationalized through institutional guarantees such as free and fair elections, freedom of expression, associational autonomy and access to alternative sources of information. A regime is democratic on this view to the extent that these guarantees hold, and erosion means their measurable contraction.

Thicker conceptions insist that electoral competition is necessary but not sufficient. Merkel's (2004) model of embedded democracy nests the electoral regime within a set of interdependent partial regimes: the rule of law, horizontal accountability between branches of government, effective power to govern, and

guaranteed political and civil rights. Where one partial regime is damaged while elections persist, the outcome is not simple autocracy but a defective democracy, whether illiberal, delegative or otherwise. The distinction bears directly on the study of backsliding, because contemporary erosion rarely begins by abolishing elections. It works first on the surrounding partial regimes, capturing courts, subordinating the media and disabling accountability, while elections continue to be held. A purely electoral standard therefore tends to register such damage late, whereas an embedded conception is designed to detect it earlier.

### 2.2. From breakdown to backsliding: a crowded terminological field

The classical literature on democratic failure, exemplified by Linz's (1978) study of the breakdown of democratic regimes, was concerned with relatively sudden ruptures, above all the collapse of interwar European democracies. Such breakdowns were dramatic and, for the analyst, comparatively easy to date. The novelty of the current period, and the source of much conceptual anxiety, is that democracies now tend to erode gradually and under legal cover, so that the point at which a democracy ceases to be one becomes difficult to identify (Lührmann and Lindberg, 2019: 1095).

Faced with this elusive process, scholars have produced a number of overlapping terms. Bermeo's (2016: 5) widely adopted definition treats democratic backsliding as the state-led debilitation or elimination of the political institutions that sustain an existing democracy. Around this core lie related notions: the democratic recession of Diamond (2015), the autocratization of Lührmann and Lindberg (2019), the constitutional retrogression of Huq and Ginsburg (2018), and older diminished subtypes such as O'Donnell's (1994) delegative democracy. These are not simply synonyms. As Section 6 argues, each carries a somewhat different theory of the process, and the choice between them is itself contested.

## 3. Classical Sociological Foundations

The contemporary field is largely the work of comparative politics and constitutional law, and it speaks the language of institutions, indices and cases. Its main intuitions, however, were already present in classical sociology, whose central objects included domination, elites and historical decline. Returning to that tradition is not merely a question of intellectual genealogy. Motoi (2017) argues that regime change is understood properly only when the classical accounts of social change are connected to later theory, and backsliding is a form of social change rather than a self-contained institutional event. Read against this background, Weber, Pareto and Spengler offer both a more precise vocabulary for the mechanisms and a warning against the field's recurrent temptations.

### 3.1. Weber: legitimate domination and the charismatic temptation

Weber provides the most useful classical starting point. His typology of legitimate domination distinguishes legal-rational, traditional and charismatic authority by the grounds on which obedience is claimed and given, and locates legitimacy in belief rather than in coercion or calculation (Weber, 2025). Legal-rational domination rests on impersonal rules and the authority of office; it is this order, the

legal and bureaucratic apparatus now discussed as the rule of law, that backsliding tends to attack.

Charismatic authority rests instead on personal devotion to an exceptional leader and is hostile to rules and routine. Weber's notion of *plebiscitary leader-democracy* (*plebiszitäre Führerdemokratie*) describes a leader legitimated by the direct acclamation of the masses, bypassing parliaments, parties and other intermediary bodies. The charismatic figures who win a decisive election and then use it to dismantle the constitutional order they inherited (Scheppele, 2018) fit this description: legitimacy shifts from impersonal legality toward personal charisma and popular acclamation. On this reading backsliding is not only institutional damage but a change in the basis of authority, from office to person and from rule to will. It also accounts for something the institutional literature tends to leave unexplained, namely the careful preservation of legal forms even as they are emptied of content. Legal-rational legitimacy is worth keeping as a façade, because it remains a resource even where personal power has become the operative principle.

### 3.2. Pareto: elite circulation and the derivations of democracy

Where Weber addresses legitimacy, Pareto addresses the question of who actually governs, and does so in deflationary terms. For Pareto (2015) every society is ruled by an elite, and history is, in his phrase, a graveyard of aristocracies; regimes change through the circulation of elites, as one governing minority is replaced by another. His account of social action separates residues, the relatively stable sentiments behind conduct, from derivations, the shifting justifications attached to them, and it distinguishes the foxes, who rule through manipulation, from the lions, who rule through force.

Applied to democracy, this yields a reading rarely found in the mainstream literature. The appeal to the people and the general will functions in part as a derivation: a justification that legitimates the rule of a particular elite while concealing it. Backsliding then looks like a phase of elite circulation, in which a counter-elite, working through manipulation or force, displaces the incumbents and turns the language of popular sovereignty against liberal-constitutional institutions. The populist claim to represent the people alone (Müller, 2016) is, on this view, a derivation of exactly that kind. Pareto's contribution is his refusal to take democratic self-description at face value, together with a cyclical picture of politics that points toward oscillation rather than steady descent.

### 3.3. Spengler and the morphology of decline

Spengler occupies a more ambivalent position, anticipating the contemporary diagnosis while also embodying what it needs to avoid. In his morphology of world history, civilizations pass through a life cycle, from the creative phase he calls *Kultur* to the exhausted, mechanical phase of *Zivilisation* (Spengler, 1996). In the late political stage of this cycle, a democracy dominated by money gives way to Caesarism: a return of personal, formless power that keeps the constitutional shell while emptying it. The parallel with current description is close. The idea that democratic forms may survive as façade while their substance drains away is much of what is meant by competitive

authoritarianism (Levitsky and Way, 2010) and by autocratic legalism (Scheppele, 2018).

Spengler is at the same time a cautionary case. His morphology is deterministic: decline is destiny, fixed by the organic fate of a culture. This is precisely the assumption the empirical literature has to resist, as Section 6 discusses. He identifies a real pattern, the persistence of form after the loss of content, while also illustrating the fatalism that turns analysis into prophecy. Taken together, the classical writers supply both tools and cautions: a vocabulary of legitimacy, elites and decline, alongside a warning against reading the people literally and against treating erosion as inevitable.

## 4. Contemporary Theories of Backsliding

### 4.1. Waves, recession and deconsolidation

The dominant framing of the contemporary period is temporal and aggregate. Building on Huntington's (1991) account of three successive waves of democratization, each followed by a partial reverse wave, Lührmann and Lindberg (2019) argue that the world has entered a third wave of autocratization. They define autocratization broadly, as democratization in reverse, any substantial move away from democracy, and identify a distinctive profile: unlike earlier reverse waves, the current one affects mainly democracies rather than autocracies, proceeds gradually and under legal cover, and finds its clearest cases in Hungary and Poland. On their estimate most contemporary episodes unfold through incremental, legal erosion under elected incumbents rather than through abrupt seizure.

This temporal diagnosis has been developed in two influential directions. Diamond (2015) characterizes the aggregate pattern as a democratic recession, marked less by outright collapse than by stagnation and shallow, cumulative deterioration. Foa and Mounk (2016), more controversially, locate the danger at the level of mass attitudes, arguing that citizens of established democracies, and younger cohorts in particular, have grown measurably less committed to democracy as a system, a process they call deconsolidation. How far this deconsolidation actually goes is disputed, but the argument shifts attention to the demand side of backsliding, taken up below in the discussion of polarization.

### 4.2. Structural, institutional and actor-centred accounts

These temporal accounts sit on top of a notable theoretical gap. In the most systematic stocktaking to date, Waldner and Lust (2018) observe that the field lacks theories of its own and has borrowed instead from established literatures on democratic transition, breakdown, consolidation and authoritarian resilience. Surveying six broad theory families, from political economy through political culture to institutional design, they conclude that none commands consensus and that the causes of backsliding remain, in their word, inchoate. The point is well taken: much of the literature describes trajectories in detail while accounting for them only loosely.

One influential response has been an actor-centred turn. Bermeo (2016) argues that the study of democratic failure has dwelt on economic and institutional correlates at the expense of choices and choosers, even though the latter are more open to rapid intervention. Levitsky and Ziblatt (2018) extend this behavioural emphasis into an

account of democratic norms as the soft guardrails of the system. Two norms are central for them: mutual toleration, whereby rivals accept one another as legitimate, and institutional forbearance, the restrained use of legal prerogatives so that they are not exploited to the hilt. On their account democracies are put at risk when parties give up their gatekeeping role and these unwritten norms weaken, frequently before any formal rule is changed. The early stages of erosion are thus behavioural and normative rather than constitutional.

### 4.3. Cultural backlash and the grievance structure

A third family of explanations foregrounds values and identity. Norris and Inglehart (2019) advance a cultural backlash thesis: the long postwar shift toward post-materialist, cosmopolitan and socially liberal values, Inglehart's earlier silent revolution, provoked a reaction among those, disproportionately older, less educated and socially conservative, who experience that shift as the displacement of the culture they knew. Authoritarian-populist parties and leaders, on this account, mobilize the resentment of the culturally dispossessed, so that values, and not economic interest alone, drive the realignment.

This line of argument links the politics of backsliding to the sociology of migration, a source of some of its sharpest grievances. The European refugee crisis of 2015 supplied the kind of issue around which nativist authoritarian-populism organized, most visibly in Central Europe (Otovescu and Otovescu, 2017). Making sense of both the movement of people and the reaction to it calls for the apparatus of migration theory (Otovescu and Ciolacu, 2021), which explains why large flows occur and why they are so readily politicized. The cultural-backlash literature therefore ties an account of migration and changing values to the political mechanisms of erosion, instead of treating those mechanisms in isolation.

## 5. Mechanisms of Erosion

Explaining why democracies become vulnerable is not the same as specifying how they are actually dismantled. Bermeo's (2016) complaint that scholarship has illuminated the why far better than the how motivates a closer look at mechanisms, four of which recur across the literature.

### 5.1. Executive aggrandizement and autocratic legalism

The characteristic mechanism of contemporary backsliding is what Bermeo (2016) calls executive aggrandizement: the incremental weakening of institutional checks by an elected executive who neutralizes courts, subdues the media and disadvantages the opposition through changes that are individually defensible and often formally legal. Bermeo sets this beside other varieties whose relative frequency has shifted over time; open-ended coups and blatant election-day fraud have grown rarer, while promissory coups and strategic electoral manipulation have grown more common. The cumulative result is a regime that still holds elections but is no longer genuinely competitive.

Legal scholarship has traced the same process at the level of constitutional design. Scheppele (2018) describes autocratic legalism, the deliberate use of law and constitutional amendment to dismantle liberal constitutionalism from within, often by

charismatic leaders wielding fresh electoral mandates, and sometimes by assembling what she calls a Frankenstate out of individually unobjectionable legal parts that together disable accountability. Huq and Ginsburg (2018) draw a parallel and now widely used distinction between reversion, the rapid and wholesale collapse of democratic government, and retrogression, its slow and incremental erosion, and argue that the second has become far more common than the first. What these accounts share is the use of legality as cover. Because each step is carried out through law, the drift toward autocracy is hard to identify early and, for the same reason, hard to oppose.

### 5.2. Populism and anti-pluralism

Populism supplies much of the ideological energy for these legal manoeuvres. Mudde (2004) analyses it as a thin-centred ideology that divides society into two homogeneous and antagonistic camps, the pure people and the corrupt elite, and holds that politics should express the *volonté générale* of the people; being thin, it attaches to fuller host ideologies, nativism on the radical right, varieties of socialism on the left. Müller (2016) locates the danger more precisely in populism's anti-pluralism and its moral claim to exclusive representation: the populist asserts that he, and he alone, represents the real people, so that opponents are recast not as legitimate rivals but as enemies of the people themselves.

This structure explains why populism in power is so corrosive of democratic institutions. If only the populist represents the authentic people, then independent courts, critical media and opposition parties become, by definition, illegitimate obstacles to the popular will, and their capture can be presented as democratization rather than its opposite. In classical terms the claim is a charismatic, plebiscitary form of legitimation in Weber's sense and, in Pareto's, a derivation that presents an elite project as direct popular rule. Populism supplies the justification for executive aggrandizement and, at the same time, the rhetoric that makes it acceptable.

### 5.3. Polarization and the citizen as failed gatekeeper

Backsliding requires not only willing leaders but a public prepared to tolerate them, which is why polarization has become central to recent work. Svolik (2019) argues that in deeply polarized electorates voters face a trade-off between their partisan interests and their democratic principles, and that many resolve it in favour of party: they decline to punish an undemocratic incumbent on their own side, because doing so would mean electing the detested opponent. Drawing on survey experiments in Venezuela and evidence from the United States, he shows that the willingness to sacrifice democratic principles rises with the intensity of partisanship, so that polarization weakens the electorate's capacity to check authoritarian ambition.

This connects to the other mechanisms. It is the demand-side counterpart to Levitsky and Ziblatt's (2018) account of collapsing mutual toleration, and it gives concrete behavioural content to Foa and Mounk's (2016) claim about deconsolidation. Where partisan hostility runs deep enough, the electorate stops acting as the final check on which democratic self-correction depends, and ordinary voters become, without intending to, participants in erosion.

### 5.4. The international and geopolitical dimension

Backsliding is, finally, not a purely domestic affair. The permissiveness of the surrounding international order conditions how far domestic actors can go. The relative retreat of Western democracy promotion, the growing capacity of authoritarian great powers to offer alternative models and material support, and the wider geopolitics of a more multipolar world all widen the room for manoeuvre available to would-be autocrats. Pescaru (2026) argues that great powers exert a structuring influence over the world order, and that their competition shapes the external environment within which national trajectories are set. External conditions can also work the other way: outside anchoring may restrain erosion, as the European Union's conditionality once did, which is why cases where such anchoring weakens carry particular weight for the study of backsliding.

## 6. Conceptual Controversies

For all its productivity, the field remains divided over basic questions of concept and measurement. These are not merely terminological quarrels; they bear directly on what counts as evidence and on how alarmed one ought to be.

### 6.1. Gradualism, intentionality and the problem of the endpoint

If erosion is incremental and legal, at what point has enough occurred to say that a democracy has ended? The absence of a bright line, no coup, no cancelled election, makes both diagnosis and dating hard (Lührmann and Lindberg, 2019). A related difficulty concerns intentionality. Bermeo (2016) notes that some measures which weaken particular institutions are undertaken, sincerely or not, in the name of deepening democracy, so that the same act may be read as reform or as sabotage depending on contested judgments about motive and effect. The difficulty of fixing an endpoint is therefore less a shortcoming of scholarship than a property of a process that its practitioners design to be ambiguous.

### 6.2. Measurement and the risk of concept stretching

Measurement compounds the difficulty. Waldner and Lust (2018) show that alternative coding schemes change the very population of cases said to have experienced backsliding, so that disagreement about method becomes disagreement about facts. Much empirical work relies on aggregate indices whose construction embeds numerous coder judgments, and small changes in thresholds move cases in and out of the category. Behind this lies a familiar hazard of comparative research, concept stretching: a term applied so broadly that it loses its power to discriminate. The growth of diminished subtypes, from delegative (O'Donnell, 1994) and defective (Merkel, 2004) to illiberal and competitive-authoritarian (Levitsky and Way, 2010), reflects an effort to keep the concept broad without letting it become empty, and the effort does not always succeed.

### 6.3. Backsliding, autocratization or de-democratization?

The choice of master term is itself contested. Lührmann and Lindberg (2019) and the wider Varieties of Democracy tradition deliberately prefer autocratization to backsliding, on the grounds that the latter is metaphorically loaded: to slide back

implies a slope and a direction, a return to some prior, lower and almost natural condition. Autocratization is meant to be neutral and gradational, the symmetric counterpart of democratization, and to carry no implication about destiny. Others favour de-democratization in order to foreground process over outcome. Each term carries a theory, and the argument between them is ultimately about whether erosion has a built-in direction and endpoint.

### 6.4. The declinist temptation

This leads to the largest controversy: whether the whole framework assumes a story of decline. Here the classical inheritance returns as a warning. Spengler's (1996) morphology is the limiting case, a vision in which democratic twilight is the organic destiny of a civilization, and the contemporary literature is not immune to milder versions of the same reflex, reading each illiberal episode as a symptom of irreversible descent. The more careful empirical work argues for caution. Bermeo (2016) observes that the successor regimes following recent backsliding tend to be shorter-lived and milder than their twentieth-century predecessors, and that some episodes are reversed; Lührmann and Lindberg (2019) note that the world remains, in aggregate, more democratic than it was in the 1970s and 1980s, and that proclaiming the end of democracy is as premature now as proclaiming its final triumph was three decades ago. Pareto's account of elite circulation points the same way, toward oscillation rather than one-directional collapse. What is required is to combine warranted concern with empirical caution, avoiding both complacency and fatalism.

## 7. Conclusion

Democratic backsliding refers to a real and historically specific development: the gradual, legal, incumbent-led erosion of democracy, carried out less by force than by elected leaders who keep democratic forms while removing their content. The literature agrees on this much, even as it divides over explanation, measurement and labelling. Its firmer results concern the mechanisms, executive aggrandizement and autocratic legalism, anti-pluralist populism, and the effect of polarization in disabling the electorate as a check, all of which operate within an international order whose permissiveness depends in part on the conduct of great powers.

Setting the current debate beside classical sociology has two advantages. Weber reframes backsliding as a change in the basis of legitimacy, from impersonal legality toward personal charisma, which explains why legal forms are retained; Pareto recasts it as a circulation of elites conducted in the language of popular sovereignty, which cautions against a literal reading of populist appeals; and Spengler, by exemplifying the fatalism the field must avoid, marks the line between analysis and prophecy. Motoi's (2017) insistence on connecting classical and modern theories of social change is a reminder that regime erosion belongs to the sociology of social change rather than standing apart from it.

Two conclusions follow. First, because political activity holds a leading position among the domains of social life (Otovescu, 2021), backsliding is not confined to constitutional arrangements; its costs reach into the economy, culture and civic life. Second, if erosion is a matter of choices rather than fate, it can in principle be reversed. The priorities for further research follow from the disputes set out above: firmer

conceptual boundaries between backsliding, autocratization and de-democratization; more transparent measurement; and a refusal of the declinist assumption. Backsliding is better understood as a warning than as a prediction, and treating it as a prediction may help to bring it about.

**References:**


1. Bermeo, N. (2016). On Democratic Backsliding. *Journal of Democracy*, 27(1), 5–19.
2. Dahl, R. A. (1971). *Polyarchy: Participation and Opposition*. New Haven: Yale University Press.
3. Diamond, L. (2015). Facing Up to the Democratic Recession. *Journal of Democracy*, 26(1), 141–155.
4. Foa, R. S., and Mounk, Y. (2016). The Danger of Deconsolidation: The Democratic Disconnect. *Journal of Democracy*, 27(3), 5–17.
5. Huntington, S. P. (1991). *The Third Wave: Democratization in the Late Twentieth Century*. Norman: University of Oklahoma Press.
6. Huq, A. Z., and Ginsburg, T. (2018). How to Lose a Constitutional Democracy. *UCLA Law Review*, 65(1), 78–169.
7. Levitsky, S., and Way, L. A. (2010). *Competitive Authoritarianism: Hybrid Regimes After the Cold War*. Cambridge: Cambridge University Press.
8. Levitsky, S., and Ziblatt, D. (2018). *How Democracies Die*. New York: Crown.
9. Linz, J. J. (1978). *The Breakdown of Democratic Regimes: Crisis, Breakdown, and Reequilibration*. Baltimore: Johns Hopkins University Press.
10. Lührmann, A., and Lindberg, S. I. (2019). A Third Wave of Autocratization Is Here: What Is New About It? *Democratization*, 26(7), 1095–1113.
11. Merkel, W. (2004). Embedded and Defective Democracies. *Democratization*, 11(5), 33–58.
12. Motoi, G. (2017). Social Change – between the Classical Sociological Perspectives and the Sociological Theories in the XXth Century. *Anuarul Institutului de Cercetări Socio-Umane „C. S. Nicolăescu-Plopşor"*, XVIII, 99–108.
13. Mudde, C. (2004). The Populist Zeitgeist. *Government and Opposition*, 39(4), 541–563.
14. Müller, J.-W. (2016). *What Is Populism?* Philadelphia: University of Pennsylvania Press.
15. Norris, P., and Inglehart, R. (2019). *Cultural Backlash: Trump, Brexit, and Authoritarian Populism*. Cambridge: Cambridge University Press.
16. O'Donnell, G. (1994). Delegative Democracy. *Journal of Democracy*, 5(1), 55–69.
17. Otovescu, A., and Ciolacu, G. P. (2021). Contemporary Sociological Theories of International Migration. *Revista Universitară de Sociologie*, XVII(1), 210–214.
18. Otovescu, A., and Otovescu, M. C. (2017). The Refugee Crisis in Europe and Addressed Solutions. *Journal of Community Positive Practices*, (2), 63–73.
19. Otovescu, M. C. (2021). *Realităţi sociale şi politici publice în România*. Bucharest: Editura Academiei Române.

20. Pareto, V. (2015). *Tratat de sociologie generală, Volumul II* (trans. L.-O. Vasilescu). Craiova: Beladi.
21. Pescaru, M. (2026). Sociologia problemelor globale. In D. Otovescu and C. Otovescu (eds.), *Sociologia contemporană. Domenii de studiu și concepte reprezentative, Volumul II* (pp. 996–1014). Craiova: Beladi.
22. Scheppele, K. L. (2018). Autocratic Legalism. *University of Chicago Law Review*, 85(2), 545–583.
23. Spengler, O. (1996). *Declinul Occidentului. Schiță de morfologie a istoriei* (trans. I. Lascu). Craiova: Beladi.
24. Svolik, M. W. (2019). Polarization versus Democracy. *Journal of Democracy*, 30(3), 20–32.
25. Waldner, D., and Lust, E. (2018). Unwelcome Change: Coming to Terms with Democratic Backsliding. *Annual Review of Political Science*, 21, 93–113.
26. Weber, M. (2025). *Economie și societate. Fundamentele sociologiei comprehensive, Volumul III. Tipuri de dominație* (trans. V. O. Cioacă). Craiova: Beladi.

# Peripheral Demographic Transitions and the Unrealized Demographic Dividend: A Sociological Analysis of Mauritania in the Sahelian Context

**Mohamed BABOU**
Doctor of Science in Population Studies, University of Oran 2 (Algeria)
Email: babou.mohamed@univ-oran2.dz

**Leila BOUDIA**
Associate Professor (PhD), University of Oran 2 (Algeria)
Email: boudia.leila@univ-oran2.dz

***Abstract:*** *This article provides a sociological analysis of Mauritania's demographic transition within the Sahelian regional context, integrating demographic transition theory, world-systems analysis, and institutional theory to examine the population–development nexus. Drawing on comparative secondary data analysis (2000–2024), three hypotheses are tested regarding the pace of fertility decline relative to urbanization, the conditions for realizing the demographic dividend, and the structural determinants of migration. Mauritania exhibits a delayed demographic transition—total fertility rate (TFR) of 4.6 children per woman despite 56.4% urbanization—explained by its peripheral economic structure, in which extractive industries generate growth without sufficient employment absorption. The demographic dividend remains unrealized due to youth unemployment exceeding 30%, literacy at 52.1%, and weak institutional capacity. Comparative positioning places Mauritania between Senegal (advanced transition, TFR 4.3) and Niger (delayed transition, TFR 6.8), with structural constraints rooted in resource dependency. The concept of "peripheral demographic transitions" is proposed to theorize demographic change in economies where extractive integration supersedes productive transformation. Policy implications center on integrated investments in female education, family-planning access, employment creation, and institutional strengthening.*

***Keywords:*** *demographic transition; peripheral economies; world-systems analysis; demographic dividend; Mauritania*

## 1. Introduction

### 1.1 Problem Statement

The relationship between demographic change and socioeconomic development constitutes a foundational problem in development sociology, particularly for countries undergoing demographic transition in the global periphery (Wallerstein, 1974; Frank, 1967; Otovescu and Otovescu, 2019). Mauritania—a Sahelian nation of 4.9 million people—represents a theoretically significant case: despite economic growth averaging 5% annually and urbanization reaching 56.4% by 2024, it retains demographic patterns characteristic of early-stage transition—TFR of 4.6, 50% of the population under age 20, and adult literacy of 52.1% (ANSADE, 2024; UN Population Division, 2024).

Classical demographic transition theory, formulated from European historical experience, posits that mortality decline precedes fertility decline through modernization: industrialization, urbanization, education expansion, and structural family change (Notestein, 1945; Thompson, 1929). Contemporary sub-Saharan African

transitions, however, exhibit systematically deviant patterns—slower fertility decline despite rapid urbanization, persistent high fertility in urban contexts, and limited productive transformation despite aggregate growth (Leshabari, 2021; Carvalho, 2021; Bongaarts and Casterline, 2013). Mauritania amplifies these theoretical anomalies, warranting focused sociological investigation.

Recent scholarship on Sahel demography emphasizes regional patterns while country-specific analyses remain limited (Alessandrini, Natale, Sermi and Vespe, 2020; Boyer, Delaunay and Gubert, 2019). Mauritania is particularly understudied despite its unique structural position: a predominantly Arab-Berber population bridging North Africa and sub-Saharan Africa, a history of nomadic pastoralism alongside extractive industrialization, and an economy concentrated in iron ore, gold, and offshore hydrocarbons (Traore, 1985; Eizenga, 2019).

### 1.2 Research Objectives

This study pursues four objectives: (1) to analyze Mauritania's demographic transition trajectory (2000–2024) across fertility, mortality, age structure, and migration; (2) to assess demographic dividend realization given structural employment and human capital constraints; (3) to compare Mauritania's demographic–development patterns with five Sahelian neighbors—Mali, Niger, Senegal, Burkina Faso, and Chad—using a systematic comparative methodology; and (4) to advance sociological theory by integrating demographic transition theory with world-systems analysis to explain peripheral transition patterns.

## 2. Theoretical Framework

### 2.1 Demographic Transition Theory and its Sub-Saharan Modifications

Demographic transition theory posits a sequential progression: from high fertility and high mortality (pre-transition), through declining mortality with sustained high fertility (early transition), to concurrent fertility decline with low mortality (late transition), and finally low fertility and low mortality equilibrium (post-transition) (Thompson, 1929; Notestein, 1945; Caldwell, 1976). Each stage is theoretically driven by structural modernization mechanisms: industrialization reduces the economic value of children while raising opportunity costs; urbanization erodes extended kinship networks; female education increases the cost of childbearing; and improved healthcare reduces precautionary fertility demand.

Applications to sub-Saharan Africa reveal systematic deviations. Fertility decline has been slower, more heterogeneous, and less correlated with urbanization than classical theory predicts, with substantial within-country variation by education and wealth (Bongaarts and Casterline, 2013). The Sahel exhibits particularly delayed transitions—TFRs exceeding 5.0 in several countries despite sustained development interventions—attributed to persistent cultural pronatalism, gender inequality, weak state service provision, and extractive economic structures (M'Baye, 2023; Adedini, 2023). These deviations suggest that standard modernization pathways are insufficient to explain Sahelian demographic trajectories.

### 2.2 World-Systems Analysis and Dependency Theory

To explain structural determinants of fertility decline and dividend realization, we integrate world-systems analysis (Wallerstein, 1974) with dependency theory (Frank, 1967). These frameworks argue that peripheral economies are structurally constrained by their subordinate position in global economic hierarchies: core economies extract surplus through unequal exchange; peripheral states exhibit limited productive transformation and dependence on primary commodity exports; and weak state capacity undermines social service provision. Three causal mechanisms link peripheral economic structures to demographic outcomes.

First, extractive economic structures generate enclave growth—capital-intensive resource extraction with limited domestic labor linkages—thereby constraining the employment creation that drives fertility decline through reduced child value and increased opportunity costs (Sokunbi, Asongu and Tchamyou, 2025). Second, fiscal dependence on volatile commodity revenues undermines sustained investment in education, healthcare, and family planning, slowing the institutional development that accelerates transitions (Eizenga, 2019). Third, structural constraints on domestic opportunity perpetuate circular and international migration as household survival strategies rather than development-enabling processes (Rain, 2018; Okyay, Zaragoza-Cristiani and Elsen, 2023).

### 2.3 Demographic Dividend Framework and Conditionality

The demographic dividend framework posits that declining fertility generates a "window of opportunity" for accelerated economic growth as the working-age population expands relative to dependents (Bloom, Canning and Sevilla, 2003). However, dividend realization is conditional: it requires concurrent investments in education, health, employment creation, and governance to translate favorable age structures into productivity gains (Cilliers, 2020; Omoruyi, 2021). In peripheral economies, rapid population growth without employment absorption risks a "demographic burden"—youth unemployment, underemployment, and out-migration as structural outcomes (Quak, 2018; Adegboye, Asongu and Osinubi, 2021). Dividend conditionality thus constitutes the central analytical bridge between demographic change and development outcomes.

### 2.4 Integrated Theoretical Model and Hypotheses

We synthesize these frameworks into an integrated analytical model. Demographic transition theory provides the conceptual structure for examining fertility, mortality, and age structure change. World-systems analysis operationalizes how Mauritania's peripheral position—extractive resource dependence, limited productive transformation, and weak state capacity—shapes transition trajectories. The demographic dividend framework specifies the conditions under which age structure change translates into development gains. Three hypotheses follow:

H1 (Delayed Fertility Transition): Mauritania's fertility decline is slower than urbanization levels predict, reflecting its extractive economic structure, which generates growth without the broad-based employment creation that reduces child economic value and raises opportunity costs.

H2 (Unrealized Demographic Dividend): Despite favorable age structure change, Mauritania has not realized demographic dividend potential due to

employment absorption failure, human capital deficits, and institutional weakness—structural features of its peripheral economic position.

H3 (Migration as Structural Response): Mauritanian migration patterns reflect structural constraints on domestic opportunity rather than development-enabling outcomes, consistent with world-systems predictions regarding peripheral labor market integration.

## 3. Methodology

### 3.1 Research Design and Comparative Logic

This study employs a mixed-methods comparative design combining quantitative secondary data analysis with systematic case comparison. The temporal scope spans 2000–2024, capturing the period of Mauritania's accelerated urbanization and resource extraction. Comparative countries—Mali, Niger, Senegal, Burkina Faso, and Chad—are selected to represent variation in transition stages while sharing Sahelian regional context, enabling the application of Mill's method of difference to isolate country-specific structural determinants (Bongaarts and Casterline, 2013).

### 3.2 Operationalization of Key Constructs

Demographic transition is operationalized through: TFR (children per woman), crude death rate (per 1,000), life expectancy at birth, and age structure percentages (under 15, 15–64, 65+). Demographic dividend is assessed through: total dependency ratio, youth unemployment rate (ages 15–24), labor force participation, sectoral employment distribution, and GDP per capita growth. Human capital is measured by adult literacy, primary completion rate, secondary enrollment, gender parity, and HDI. Economic structure is characterized by sectoral GDP composition, export concentration indices, and foreign direct investment patterns.

### 3.3 Data Sources and Limitations

Primary data sources include: ANSADE national statistics (2019, 2024), UN Population Division World Population Prospects (2024), World Bank World Development Indicators (2024), UNDP Human Development Reports (1990–2023), ILO employment statistics, and Demographic and Health Survey data for Mauritania and comparators. Limitations include variable data quality across countries and time periods, addressed through triangulation; reliance on secondary data, which precludes micro-level household analysis; and the restriction of comparisons to Sahel countries, which limits generalizability to other peripheral contexts.

## 4. Mauritania's Demographic Transition: Empirical Analysis

### 4.1 Fertility Patterns and Urban-Rural Differentials

Mauritania's TFR declined from 5.7 children per woman in 2000 to 4.6 in 2024—a 19.3% reduction over 24 years (ANSADE, 2024; UN Population Division, 2024). This pace lags behind the sub-Saharan African average (32% decline over the same period) and North African neighbors (Morocco: 45%, Tunisia: 38%). Temporal disaggregation reveals structural stagnation: initial decline from 5.7 to 4.9 (2000–2010), followed by a near plateau at 4.9–4.8 (2010–2018), and modest resumption to 4.6 (2018–2024).

Urban-rural fertility differentials are large but insufficient to explain aggregate stagnation. Urban TFR stands at 3.8, versus 5.9 in rural areas—a 2.1-child gap—yet urban fertility remains elevated relative to comparable African urbanization contexts (ANSADE, 2019). Educational differentials are sharper and theoretically more significant: women with secondary or higher education average 2.9 children compared to 5.8 for women with no formal education—a 2.9-child differential, consistent with Caldwell's (1976) education–fertility transmission mechanism. Modern contraceptive prevalence remains at 17.8% among married women aged 15–49 (ONS, MS and ICF, 2022), substantially below the sub-Saharan African average of 28.5%, with unmet need affecting 25.4% of married women—indicating substantive suppressed demand alongside normative and supply-side barriers.

### 4.2 Mortality Decline and Epidemiological Transition

Mauritania has achieved significant reductions in mortality, consistent with an early demographic transition: life expectancy increased from 59.2 to 64.7 years (2000–2024), and under-five mortality declined from 116 to 76 per 1,000 live births (34.5% reduction) (UN Population Division, 2024; World Bank, 2024). However, maternal mortality remains at 766 deaths per 100,000 live births—among the highest globally—reflecting acute infrastructure deficits in rural health service provision (WHO, 2020). The persistence of high communicable disease burden alongside emerging non-communicable disease patterns indicates an incomplete epidemiological transition characteristic of resource-constrained peripheral health systems.

### 4.3 Age Structure, Dependency, and the Demographic Window

The 2024 age structure shows 40.8% under 15, 55.7% aged 15–64, and 3.5% aged 65+, generating a total dependency ratio of 79.6—comprising 73.2 child dependents and 6.4 elderly dependents per 100 working-age persons (ANSADE, 2024). This dependency ratio has declined modestly from 85.1 in 2000, reflecting slow fertility decline. UN projections indicate that Mauritania's demographic window of opportunity—when the working-age share peaks relative to dependents—will open more fully between 2030 and 2050 (UN Population Division, 2024). Capitalizing on this window requires concurrent investments in employment and human capital that current trajectories do not support.

### 4.4 Urbanization and Migration Patterns

Urban population share increased from 40.2% to 56.4% (2000–2024), one of the Sahel's fastest urbanization rates, with Nouakchott housing approximately 30% of the national population—a primacy pattern characteristic of peripheral urban systems (Boyer, Delaunay and Gubert, 2019). Rural-urban migration reflects push dynamics—rural poverty, climate vulnerability, declining pastoral viability—rather than urban employment-led pull, contributing to urban poverty (14.4%) and informal settlement expansion (ANSADE, 2019). Nomadic populations have declined from approximately 70% to 5–10% of the population as sedentarization accelerates under climate and economic pressures (Traore, 1985; ANSADE, 2024).

International migration is modest relative to Sahel neighbors: approximately 120,000 Mauritanians reside abroad (2.4% of population), with remittance inflows totaling $58 million in 2023 (0.6% of GDP), substantially below Senegal (10.7%) and

Mali (6.8%) (World Bank, 2024). This underdeveloped migration-remittance system reflects weaker diaspora networks attributable to Mauritania's later independence, distinct colonial labor recruitment history, and Arab-Berber identity creating different destination geographies and labor market integration trajectories compared to sub-Saharan Sahelian neighbors.

## 5. Comparative Analysis: Mauritania In The Sahel Context

### 5.1 Comparative Demographic Indicators

Table 1 presents comparative demographic indicators for Mauritania and five Sahel neighbors.

**Table 1. Comparative Demographic Indicators, Sahel Countries (2024)**

| Indicator | Mauritania | Mali | Niger | Senegal | Burkina Faso | Chad |
|---|---|---|---|---|---|---|
| Population (millions) | 4.9 | 22.6 | 26.2 | 17.8 | 22.1 | 17.7 |
| TFR (children/woman) | 4.6 | 5.8 | 6.8 | 4.3 | 5.1 | 6.1 |
| Life expectancy (years) | 64.7 | 59.3 | 62.4 | 68.1 | 61.6 | 54.2 |
| Urban population (%) | 56.4 | 44.7 | 16.8 | 49.3 | 32.0 | 23.9 |
| Dependency ratio | 79.6 | 95.8 | 106.2 | 82.1 | 89.4 | 99.7 |
| Under-5 mortality (per 1,000) | 76 | 96 | 84 | 38 | 87 | 117 |

*Sources: UN Population Division (2024); World Bank (2024); ANSADE (2024)*

Three empirical patterns warrant theoretical attention. First, Mauritania's urbanization level (56.4%) exceeds all comparators, including Senegal (49.3%), yet its TFR (4.6) is significantly higher than Senegal's (4.3) and approximates less urbanized Mali (5.8)—constituting an urbanization–fertility disjuncture inconsistent with standard modernization predictions. Second, Mauritania's dependency ratio (79.6) is the lowest among comparators, creating theoretically favorable conditions for dividend realization that remain structurally unexploited. Third, Mauritania's mortality performance is intermediate—life expectancy (64.7) exceeds Mali (59.3) and Chad (54.2) but lags Senegal (68.1), reflecting partial but incomplete epidemiological transition.

### 5.2 Comparative Economic and Human Development Indicators

Table 2 presents comparative economic and human development indicators.

**Table 2. Comparative Economic and Development Indicators, Sahel Countries (2024)**

| Indicator | Mauritania | Mali | Niger | Senegal | Burkina Faso | Chad |
|---|---|---|---|---|---|---|
| GDP per capita (USD) | 1,673 | 916 | 553 | 1,607 | 893 | 696 |
| GDP growth rate (%) | 6.5 | 4.8 | 6.9 | 4.1 | 6.2 | 3.8 |
| Youth unemployment (%) | 30.2 | 8.6 | 16.8 | 22.7 | 8.3 | 21.4 |
| Adult literacy (%) | 52.1 | 35.5 | 37.3 | 56.3 | 41.2 | 22.3 |
| HDI value | 0.546 | 0.428 | 0.400 | 0.511 | 0.449 | 0.394 |
| HDI rank (out of 193) | 158 | 186 | 189 | 170 | 184 | 190 |

*Sources: World Bank (2024); UNDP (2024); ILO (2024)*

Mauritania's GDP per capita ($1,673) exceeds most Sahel neighbors, reflecting extractive resource revenues. However, this macroeconomic advantage correlates inversely with employment absorption capacity: Mauritania's youth unemployment rate (30.2%) is the highest in the comparison group, substantially exceeding Niger (16.8%), Senegal (22.7%), and Chad (21.4%)—constituting the empirical signature of "jobless growth" in enclave-extractive economies (Okyay, Zaragoza-Cristiani and Elsen, 2023; Adegboye, Asongu and Osinubi, 2021).

Mauritania's HDI (0.546, rank 158/193) positions it above most Sahel neighbors in composite human development, yet its gender literacy gap (male 62.0% vs. female 43.1%—an 18.9 percentage-point differential) identifies female human capital investment as the binding constraint on fertility transition and dividend realization.

### 5.3 Mauritania's Intermediate Structural Position

Comparative synthesis positions Mauritania at an intermediate juncture characterized by: (a) urbanization levels exceeding the regional average (56.4% vs. 37.1%), (b) intermediate fertility transition (TFR 4.6, between Senegal's 4.3 and Niger's 6.8), (c) higher GDP per capita reflecting extractive revenues, (d) the highest youth unemployment in the comparison group (30.2%), and (e) underdeveloped migration-remittance systems relative to Senegal and Mali. This configuration—resource-driven growth with employment absorption failure and incomplete human capital development—constitutes the structural signature requiring theoretical explanation.

## 6. DISCUSSION: SOCIOLOGICAL INTERPRETATION OF FINDINGS

### 6.1 H1 Confirmed: The Structural Basis of Delayed Fertility Transition

The data confirm H1. Mauritania's urbanization–fertility disjuncture—higher urbanization than most Sahel neighbors but slower fertility decline than Senegal—can be explained only by structural mechanisms beyond urbanization itself. Mauritania's economic growth is driven primarily by capital-intensive extractive industries (iron ore, gold, hydrocarbons) with limited domestic employment linkages, constraining the

urban labor market integration that classically drives fertility decline by raising the opportunity cost of childbearing and reducing children's economic value (World Bank, 2024; Caldwell, 1976).

This pattern constitutes what we term "urbanization without social modernization": urban residents maintain high fertility norms rooted in Arab-Berber cultural frameworks emphasizing large families and tribal solidarity, sustaining pronatalist preferences even in urban contexts. Traditional authority structures—tribal and religious—mediate the translation of urbanization into fertility behavior, creating a cultural buffer that slows normative change relative to the structural changes anticipated by classical theory. Bongaarts and Casterline's (2013) observation that sub-Saharan urban fertility diverges from European historical patterns finds its structural explanation here in the absence of productive economic transformation.

### 6.2 H2 Confirmed: Structural Constraints on Demographic Dividend Realization

The evidence strongly confirms H2. Three structural constraints explain the unrealized demographic dividend. First, employment absorption failure: the formal sector employs only 15–20% of the labor force, with youth unemployment at 30.2% and underemployment substantially higher (ILO, 2024). Extractive sector growth is capital-intensive and enclave in character, generating revenue flows that do not penetrate labor markets. This "jobless growth" pattern directly reflects Wallerstein's (1974) model of peripheral surplus extraction—growth without productive transformation.

Second, human capital deficits: adult literacy at 52.1%, secondary enrollment at 28.3%, and the 18.9 percentage-point gender literacy gap collectively constrain labor force productivity and female agency over fertility (ANSADE, 2024). The 2.9-child fertility differential between educated and uneducated women identifies female secondary education as the binding human capital constraint. Third, institutional weakness: governance indicators reveal limited state capacity, fiscal vulnerability, and weak labor market institutions—constraining both service delivery and employment creation (World Bank, 2023; Eizenga, 2019). These constraints are not independent policy failures but structural features of peripheral economic integration, consistent with dependency theory's emphasis on how peripheral position reproduces institutional underdevelopment.

### 6.3 H3 Partially Confirmed: Migration as Structural Response

The evidence provides mixed but largely supportive results for H3. Internal migration patterns strongly support the structural response hypothesis: rural-urban migration reflects push dynamics from climate vulnerability, pastoral marginalization, and agricultural decline rather than employment-driven pull (Alessandrini et al., 2020; Graves, Matthews and Waldie, 2019). Sedentarization of nomadic populations likewise reflects structural pressures—desertification and economic marginalization of pastoralism—rather than voluntary lifestyle transitions.

International migration patterns, however, partially qualify H3. Mauritania's underdeveloped diaspora and low remittance-to-GDP ratio (0.6%) compared to Senegal (10.7%) and Mali (6.8%) indicates that structural constraints have not generated the large-scale international migration observed elsewhere in the Sahel.

This divergence is attributable to path-dependent migration network formation: Senegal and Mali developed diaspora networks through colonial-era labor recruitment to France, creating self-reinforcing migration corridors that Mauritania lacks (Okyay, Zaragoza-Cristiani and Elsen, 2023). Mauritania's Arab-Berber cultural identity also generates distinct destination geographies (Middle East, North Africa) with less favorable labor market integration outcomes.

### 6.4 Peripheral Demographic Transitions: A Theoretical Synthesis

Integrating empirical findings with theoretical frameworks, we advance the concept of "peripheral demographic transitions" to theorize demographic change in economies characterized by extractive integration rather than productive transformation. Peripheral transitions exhibit six structural characteristics: (1) extractive economic structures generating enclave growth without employment absorption; (2) weak state capacity constraining education, healthcare, and family planning provision; (3) persistence of traditional social structures alongside rapid urbanization, maintaining pronatalist norms; (4) delayed and incomplete fertility transitions despite urbanization and mortality decline; (5) unrealized demographic dividends due to employment and human capital deficits; and (6) migration as a structural survival response to constrained domestic opportunity.

This concept extends demographic transition theory by specifying the conditions under which modernization pathways diverge from classical European trajectories. It challenges linear modernization narratives by demonstrating that urbanization without productive economic transformation does not generate the social conditions that drive fertility decline. It positions demographic trajectories as structurally determined by global economic integration patterns, not merely by internal institutional development. Mauritania's case provides empirical support for this theoretical extension, which may apply to other peripheral economies combining resource extraction with limited productive transformation.

## 7. Conclusions And Policy Implications

### 7.1 Summary of Findings and Theoretical Contributions

This study provides the first comprehensive sociological analysis of Mauritania's demographic transition, yielding five empirical findings: (1) delayed fertility decline (TFR 4.6) relative to urbanization levels (56.4%), explicable by extractive economic structure; (2) unrealized demographic dividend attributable to employment absorption failure (youth unemployment 30.2%), human capital deficits (literacy 52.1%), and institutional weakness; (3) intermediate regional positioning between Senegal (advanced transition) and Niger/Chad (delayed transition); (4) structural determination of demographic trajectories by peripheral economic integration; and (5) internal migration as structural response to constrained domestic opportunity, with underdeveloped international migration due to historically weaker diaspora network formation.

Theoretically, this study contributes three advances. First, the concept of peripheral demographic transitions theorizes fertility decline and dividend realization as structurally determined by global economic integration patterns. Second, integration of demographic transition theory with world-systems analysis and

institutional theory generates sociological—rather than merely demographic—explanations of population change. Third, a systematic comparative methodology identifies Mauritania's country-specific structural position within regional demographic–development trajectories.

### 7.2 Evidence-Based Policy Recommendations

Four integrated policy priorities follow from the analysis. First, expansion of female secondary education constitutes the single most effective intervention for accelerating fertility decline, given the 2.9-child differential between educated and uneducated women—requiring increased education budgets, rural school construction, fee elimination, and active measures to address gender barriers. Second, family planning access expansion must address the 25.4% unmet need through community-based service delivery, male engagement programs, and supply-chain strengthening. Third, economic diversification beyond extractive industries is essential for employment creation, requiring support for labor-intensive manufacturing, small enterprise development, and active labor market policies—ECOWAS regional integration can expand market access (Quak, 2018; Adegboye, Asongu and Osinubi, 2021). Fourth, extractive resource revenues must be channeled toward human capital and institutional investment rather than elite consumption, requiring improved public financial management, anti-corruption measures, and local government capacity strengthening (Eizenga, 2019). These interventions must be implemented concurrently: Mauritania's demographic window (2030–2050) imposes urgency on integrated policy action.

### 7.3 Future Research Agenda

This analysis identifies four priorities for future research. Primary household data collection is required to illuminate micro-level fertility decision mechanisms underlying aggregate patterns. Qualitative and ethnographic investigation of urban households and pastoral communities would reveal how individuals navigate demographic transitions under structural constraint. Longitudinal panel data would enable causal analysis of education–employment–fertility relationships. Finally, extending the peripheral transition framework to other resource-dependent economies—Central Asia, Pacific Island states—would test generalizability and refine theoretical scope conditions.

**References:**

1. Adedini, S. (2023). How Can African Countries Address Climate Change Problems and Optimise Demographic Dividends for Socioeconomic Development? The Journal of Population and Sustainability, 63(7), 99–106. https://doi.org/10.3197/jps.63799953906867
2. Adegboye, A., Asongu, S., and Osinubi, T. (2021). Decomposing employment growth in selected sub-Saharan African countries: The roles of structural changes and demographic transition. Canadian Journal of African Studies, 11(2), 6–8. https://doi.org/10.33429/CJAS.11220.6/8

3. Alessandrini, A., Natale, F., Sermi, F., and Vespe, M. (2020). Population dynamics, climate change and variability in Western Africa: The case of Sahel regions. In Oxford Handbook of the Sahel. Oxford University Press.
4. Bloom, D., Canning, D., and Sevilla, J. (2003). The Demographic Dividend: A New Perspective on the Economic Consequences of Population Change. RAND Corporation.
5. Bongaarts, J. (2009). Human population growth and the demographic transition. Philosophical Transactions of the Royal Society B, 364(1532), 2985–2990.
6. Bongaarts, J., and Casterline, J. (2013). Fertility transition: Is sub-Saharan Africa different? Population and Development Review, 38(Supplement), 153–168.
7. Boyer, F., Delaunay, D., and Gubert, F. (2019). Urbanization and the Dynamics of Change in the Sahel. In Oxford Handbook of the Sahel (pp. 621–638). Oxford University Press. https://doi.org/10.1093/oxfordhb/9780198816959.013.41
8. Caldwell, J. (1976). Toward a restatement of demographic transition theory. Population and Development Review, 2(3/4), 321–366.
9. Carvalho, P. (2021). Population growth challenges in sub-Saharan Africa: Are they just demographic? African Population Studies, 35(1), 1–15. https://doi.org/10.34628/T9X8-6077
10. Cilliers, J. (2020). Harnessing and advancing Africa's future demographic dividend. African Futures Paper, Institute for Security Studies.
11. Egenti, M., Odo, C., and Nwankwo, C. (2023). International Migration, Remittance Flows, and Economic Growth among West African Countries. Journal of Development Economics, 45(2), 234–256.
12. Eizenga, D. (2019). Long term trends across security and development in the Sahel. OECD Sahel and West Africa Club Secretariat Working Papers, No. 1. https://doi.org/10.1787/630477EE-EN
13. Frank, A. (1967). Capitalism and Underdevelopment in Latin America. Monthly Review Press.
14. Graves, A., Matthews, R., and Waldie, K. (2019). Demography and Health in the Context of Climate Change. In Oxford Handbook of the Sahel (pp. 289–308). Oxford University Press. https://doi.org/10.1093/oxfordhb/9780198816959.013.14
15. International Labour Organization (ILO). (2024). ILOSTAT Database. https://ilostat.ilo.org
16. Leshabari, S. (2021). Demographic transition in sub-Saharan Africa: From grassroots to ivory towers. In Population Growth and Rapid Urbanization in the Developing World (pp. 1–18). IntechOpen. https://doi.org/10.5772/INTECHOPEN.98407
17. M'Baye, E. (2023). Fertility, employment, and the demographic dividend in sub-Saharan African countries with incipient demographic transition: Evidence from Mali. Journal of Population Research, 40(2), 1–24. https://doi.org/10.1007/s12546-023-09299-7
18. National Agency for Statistics and Demographic and Economic Analysis (ANSADE). (2019). Enquête Permanente sur les Conditions de Vie des Ménages (EPCV) 2019. Nouakchott, Mauritania.

19. National Agency for Statistics and Demographic and Economic Analysis (ANSADE). (2024). Projections Démographiques 2024. Nouakchott, Mauritania.
20. Notestein, F. (1945). Population: The long view. In T. Schultz (Ed.), Food for the World (pp. 36–57). University of Chicago Press.
21. Office National de la Statistique (ONS), Ministère de la Santé (MS), and ICF. (2022). Enquête Démographique et de Santé en Mauritanie 2019–2021. Nouakchott, Mauritania, and Rockville, Maryland, USA: ONS, MS, and ICF.
22. Okyay, A., Zaragoza-Cristiani, J., and Elsen, S. (2023). Moving Towards Europe: Migration and Mobility Partnerships in the Sahel and the Horn of Africa. Peter Lang. https://doi.org/10.3726/b20682
23. Omoruyi, E. (2021). Harnessing the Demographic Dividend in Africa Through Lessons From East Asia's Experience. The Journal of Comparative Asian Development, 20(1), 1–24. https://doi.org/10.4018/JCAD.20210701.OA1
24. Quak, E. (2018). Drivers, Challenges and Opportunities for Job Creation in the Sahel. K4D Helpdesk Report. Institute of Development Studies.
25. Otovescu, C., & Otovescu, A. (2019). The depopulation of Romania–Is it an irreversible process?. *Revista de cercetare si interventie sociala*, *65*, 370-388.
26. Rain, D. (2018). Eaters of the Dry Season: Circular Labor Migration in the West African Sahel. Routledge.
27. Sokunbi, G., Asongu, S., and Tchamyou, V. (2025). Interaction Effect of Unemployment and International Migration on Sustainable Economic Growth in West Africa. Journal of African Economies, 5(7), 18–35. https://doi.org/10.63660/jaze.2025.0507.018
28. Thompson, W. (1929). Population. American Journal of Sociology, 34(6), 959–975.
29. Traore, S. (1985). Demographic characteristics and trends amongst the nomads of Mauritania. Population Studies, 39(2), 267–280.
30. United Nations Department of Economic and Social Affairs (UN DESA). (2020). International Migrant Stock 2020. https://www.un.org/development/desa/pd/
31. United Nations Development Programme (UNDP). (2024). Human Development Report 2023–2024. New York: UNDP.
32. United Nations Population Division. (2024). World Population Prospects 2024. New York: United Nations.
33. Wallerstein, I. (1974). The Modern World-System I: Capitalist Agriculture and the Origins of the European World-Economy in the Sixteenth Century. Academic Press.
34. World Bank. (2023). Worldwide Governance Indicators 2023. Washington, DC: World Bank. Available at: https://databank.worldbank.org/source/worldwide-governance-indicators
35. World Bank. (2024). World Development Indicators 2024. Washington, DC: World Bank. https://databank.worldbank.org
36. World Health Organization (WHO). (2020). Trends in Maternal Mortality 2000 to 2020. Geneva: WHO.

# Optimizing the Experience of Meaning: An Evaluation Model

**Florena ANTONESCU**
Teaching Assistant, PhD Candidate, Ovidius University, Constanţa, Romania
Email: florena.antonescu@yahoo.com

***Abstract:*** *Meaning in life is a central construct in psychological research, yet its assessment remains affected by conceptual overlap, cultural variability, and inconsistent factorial structures across existing instruments. The present study aimed to develop and preliminarily validate the Scale of the Experience of Meaning in Life (SEM), an instrument designed to assess existential orientation from an integrative psychological and philosophical perspective. Data were collected through an online questionnaire from a convenience sample of 232 Romanian adults aged between 18 and 80 years. Participants completed the newly developed SEM, the Meaning in Life Questionnaire, and the Satisfaction With Life Scale. Exploratory factor analysis using Principal Axis Factoring indicated that the initially proposed multidimensional model was not fully supported. Instead, the results revealed a robust general factor reflecting the global experience of meaning in life, centered on meaning, authenticity, and personal responsibility, alongside a secondary component related to the integration of suffering. The general SEM factor demonstrated excellent internal consistency, with Cronbach's α = .94, while the integration of suffering subscale showed acceptable reliability, with Cronbach's α = .72. Evidence for construct validity was supported by significant positive correlations between the experience of meaning in life and life satisfaction, r = .56, and presence of meaning, r = .66, as well as by a significant negative correlation with search for meaning, r = –.34. The findings support the SEM as a promising measure of existential integration and suggest that the integration of suffering should be reconsidered as a complementary construct in future research.*

***Keywords****: meaning in life; existential orientation; scale development; construct validity; life satisfaction*

## 1. Introduction

The concept of meaning in life has been of constant interest to philosophy, religion, and, more recently, to psychology, where it has been integrated into theories of well-being and optimal functioning. Despite the theoretical and applied importance of the construct, the specialized literature faces difficulties regarding the definition and measurement of purpose in life. A review conducted by Schultz (2015) identified 26 psychometric instruments used to assess it, grouped into three categories: (1) measures that directly assess purpose in life, (2) instruments that investigate related constructs, and (3) complex scales in which purpose appears as a secondary dimension.

The analysis reveals that many of these measures suffer from validity problems and conceptual overlaps, sometimes confusing purpose with the general meaning of life or even with the absence of depressive symptoms. Among the instruments with promising results are the Personal Meaning Profile and the Meaning in Life Questionnaire, owing to their more rigorous methodological approaches and their capacity to distinguish between complementary dimensions such as the presence and the search for meaning. The conclusions of this literature review highlight the need for

clearer conceptual definitions and more robust psychometric instruments that allow valid assessments and cross-cultural comparisons.

### 1.1 Measurement Instruments for Meaning in Life

The assessment of meaning in life has generated a diverse psychometric literature, but existing instruments differ substantially in their conceptual assumptions, dimensional structure, and cultural applicability. A review conducted by Schultz (2015) indicated that measures of purpose and meaning in life often vary in the degree to which they assess meaning directly, related existential constructs, or broader indicators of psychological well-being. This diversity has contributed to conceptual overlap between meaning, purpose, life satisfaction, psychological adjustment, and the absence of psychopathological symptoms. Consequently, the measurement of meaning in life remains a relevant methodological issue, especially in cultural contexts in which only a limited number of instruments have been adapted and validated.

One of the most frequently used instruments is the Meaning in Life Questionnaire, developed by Steger, Frazier, Oishi, and Kaler (2006), which distinguishes between the presence of meaning and the search for meaning. This distinction is particularly important because the two dimensions reflect different psychological processes: the presence of meaning is generally associated with well-being, life satisfaction, optimism, and adaptive functioning, whereas the search for meaning may be associated with existential uncertainty, distress, or a motivational process of meaning construction. Cross-cultural studies have generally supported the two-factor structure and reliability of the MLQ, although some findings suggest that the interpretation of the search for meaning may vary across populations and cultural contexts (Damásio and Koller, 2015; Rose et al., 2017; Schutte et al., 2023; Temane et al., 2014). These results support the relevance of the MLQ for assessing meaning in life, while also indicating the need for culturally sensitive approaches.

Another influential instrument is the Purpose-in-Life Test, developed by Crumbaugh (1968) within the theoretical framework of Frankl's logotherapy. The PIL was designed to assess the degree to which individuals experience their lives as purposeful and meaningful. Empirical studies have shown that the instrument can discriminate between clinical and non-clinical groups and is negatively associated with depression and psychological distress (Crumbaugh, 1968). However, subsequent research has questioned its strict unidimensionality, suggesting that it may capture related dimensions such as purposeful life and exciting life (Schulenberg and Melton, 2010). Shorter versions of the PIL have also shown adequate reliability and convergent validity, but the instrument remains partly influenced by its original existential-clinical framing (Schulenberg et al., 2011). Thus, the PIL remains theoretically important, but its dimensional structure and conceptual boundaries require careful interpretation.

A broader approach is provided by the Sources of Meaning and Meaning in Life Questionnaire, developed by Schnell (2009), which differentiates between meaningfulness, crisis of meaning, and multiple sources of meaning. This model is valuable because it does not reduce meaning in life to the mere presence of purpose, but considers existential coherence, belonging, self-transcendence, self-actualization, order, and relational well-being. Cross-cultural adaptations of the SoMe have supported its usefulness, although they also indicate that the organization of sources

of meaning may differ across cultural contexts (Damásio et al., 2013; Peltomäki et al., 2024; Sørensen et al., 2019). The distinction between meaningfulness and crisis of meaning is particularly relevant, as the presence of meaning and the absence of existential emptiness are not necessarily identical psychological states.

The Existence Scale, developed by Längle, Orgler, and Kundi (2003), represents another important contribution, as it operationalizes existential fulfilment through competencies such as self-distance, self-transcendence, freedom, and responsibility. Unlike instruments focused mainly on purpose or subjective meaningfulness, the Existence Scale emphasizes the individual's capacity to relate authentically to the self, to others, and to existential conditions. Validation studies have supported its reliability and its ability to differentiate between general and clinical populations, while more recent cultural adaptations have confirmed its relevance in non-Western contexts (Akhan et al., 2024; Alfuqaha et al., 2022; Längle et al., 2003). This perspective is especially useful for developing a measure that integrates meaning, authenticity, responsibility, and existential orientation.

Other instruments, such as the Life Regard Index, the Personal Meaning Profile, and the Meaningful Life Measure, have contributed to the refinement of the construct by emphasizing dimensions such as fulfilment, personal significance, achievement, relationships, self-acceptance, values, and life appreciation (Carreño et al., 2020; Debats et al., 1993; MacDonald et al., 2013; Morgan and Farsides, 2009). However, some of these measures present limitations related to factorial instability, high correlations between subscales, reduced sensitivity at high levels of meaning, or potential overlap with broader well-being constructs (Harris and Standard, 2001; Van Ranst and Marcoen, 1997; Yockey, 2006). Taken together, the existing literature indicates that meaning in life is a multidimensional and culturally embedded construct, but also that current instruments do not fully integrate existential meaning, authenticity, relational embeddedness, axiological orientation, and responsibility within a unified assessment model.

Therefore, the development of the Scale of the Experience of Meaning in Life is justified by both theoretical and methodological considerations. The proposed instrument builds on previous psychometric traditions, particularly those represented by the MLQ, PIL, SoMe, and Existence Scale, but aims to offer a more integrative framework for assessing existential orientation in the Romanian population. Rather than measuring meaning only as purpose, satisfaction, or absence of distress, the SEM seeks to capture how individuals relate to their own existence, values, relationships, freedom, responsibility, and limit experiences.

### 1.2 Measuring Meaning in Life in the Romanian Population

Although the international literature contains a multitude of instruments for measuring meaning in life, such instruments have been used only sparingly with the Romanian population. For example, the study conducted by Buzea and Dimitrova (2017) investigated the relationship between positive affect and meaning in life among Romanian emerging adults, using the Romanian version of the MLQ (Steger, Frazier, Oishi, and Kaler, 2006). The participants were 182 young adults recruited from the city of Braşov. The MLQ adaptation process complied with the methodological standards of linguistic and cultural equivalence, including translation and back-translation performed by bilingual speakers, as well as testing through a focus group to verify the

appropriateness of the items. The psychometric analyses demonstrated high levels of internal consistency for both MLQ subscales: presence of meaning (α = .80) and search for meaning (α = .82). The results revealed that positive affect is positively associated with meaning in life. The study conducted by Voicu (2024) examined the relationship between meaning in life, life satisfaction, and quality of life among older adults in Romania, also using the Romanian version of the MLQ. The sample included 200 older adults. The results showed that presence of meaning in life has a significant positive association with life satisfaction and quality of life.

The study conducted by Éva Kállay and Claudia Lenuţa Rus (2015) investigated the factorial validity and reliability of the LRI in a Romanian context. Two convenience samples from the general population were used, with $N_1$ = 870 and $N_2$ = 800 participants. Regarding reliability, the scores for the subscales, as well as for the instrument as a whole, achieved values above the .70 threshold, considered adequate.

Taken together, the existing Romanian studies suggest that meaning in life has been examined only to a limited extent, mainly through adaptations or applications of established international instruments such as the MLQ and the LRI. Although these studies provide useful preliminary evidence regarding the relevance of meaning in life for Romanian samples, they do not offer an integrative instrument specifically designed to assess existential orientation, authenticity, responsibility, relational embeddedness, and the integration of limit experiences. This gap supports the need for developing and preliminarily validating the Scale of the Experience of Meaning in Life in the Romanian context.

### 1.3 The Present Study

The existing literature indicates that meaning in life is a theoretically important but psychometrically complex construct. Although several instruments have been developed to assess meaning, purpose, existential fulfilment, or sources of meaning, previous research has also highlighted conceptual overlap, factorial instability, cultural variability, and difficulties in distinguishing meaning in life from adjacent constructs such as life satisfaction, psychological well-being, or the absence of psychological distress. In the Romanian context, empirical research on meaning in life remains limited and has relied mainly on adaptations or applications of established international instruments, such as the Meaning in Life Questionnaire and the Life Regard Index. Consequently, there is a need for an instrument developed in close relation to the Romanian cultural context and designed to assess the broader existential experience of meaning.

The present study aimed to develop and preliminarily validate the Scale of the Experience of Meaning in Life (SEM), a new assessment instrument designed to capture how individuals relate to their own existence from an integrative psychological and philosophical perspective. The SEM was theoretically constructed to reflect several existentially relevant components, including meaning and direction, authenticity and personal identity, relational embeddedness, axiological orientation, responsibility, freedom, and the integration of limit experiences. Rather than assuming that these components would necessarily function as independent dimensions, the present study examined their empirical organization through exploratory factor analysis.

The specific objectives of the study were: first, to explore the latent factorial structure of the SEM in a Romanian adult sample; second, to assess the internal consistency of the factors identified through exploratory analysis; and third, to examine preliminary evidence of construct validity by analyzing the associations between the SEM, life satisfaction, presence of meaning, and search for meaning. Based on previous literature, it was expected that higher scores on the SEM would be positively associated with life satisfaction and presence of meaning, and negatively associated with search for meaning. Given the preliminary nature of the study, the factorial structure of the instrument was investigated exploratorily, without imposing a strict confirmatory model.

Through this approach, the present research seeks to contribute to the psychometric assessment of meaning in life by proposing a culturally relevant instrument focused not only on purpose or subjective meaningfulness, but also on the broader existential orientation through which individuals interpret their lives, assume responsibility, relate to others, and position themselves in relation to values, freedom, and human limits.

## 2. Methodology

### 2.1 Participants and Procedure

The data were collected through an online questionnaire administered to a convenience sample of Romanian adults. Participants were invited to complete the newly developed assessment instrument together with standardized measures of meaning in life and life satisfaction, as well as a brief demographic form including age, gender, educational level, marital status, field of activity, and tenure at the current job. Data collection took place at a single point in time, without experimental manipulation, in accordance with a cross-sectional research design. Before completing the questionnaire, participants were informed about the general aim of the study, the anonymous and voluntary nature of participation, and the confidentiality of the data. Informed consent was obtained electronically, and responses were used exclusively for scientific purposes.

The final sample consisted of 232 participants, of whom 189 were women (81.5%) and 43 were men (18.5%). Participants' ages ranged from 18 to 80 years, with a mean age of 40.75 years (SD = 12.07). Regarding marital status, 144 participants were married (62.1%), 50 were in a relationship (21.6%), and 38 were single (16.4%). Most participants had completed higher education: 102 held a bachelor's degree (44.0%), and 99 held a master's degree (42.7%). A smaller proportion had completed high school (n = 27, 11.6%), while four participants did not report their educational level. Participants came from diverse occupational sectors, including education, health and social services, public administration, business services, finance, transportation, construction, trade, hospitality, and other fields. Among those who reported job tenure, professional experience at the current job ranged from 1 to 46 years, with a mean of 12.62 years (SD = 10.04).

### 2.2 Measurement Instruments

Meaning in life was assessed using the Meaning in Life Questionnaire (MLQ; Steger, Frazier, Oishi, and Kaler, 2006), a ten-item instrument designed to measure two dimensions: presence of meaning and search for meaning. The MLQ has demonstrated adequate internal consistency, temporal stability, and convergent and discriminant validity across different cultural contexts and has also been used in Romanian samples (Buzea and Dimitrova, 2017; Voicu, 2024). Participants responded on a 7-point Likert scale, ranging from 1 = Absolutely untrue to 7 = Absolutely true.

Life satisfaction was measured using the Satisfaction With Life Scale (SWLS; Diener, Emmons, Larsen, and Griffin, 1985), a widely used five-item instrument designed to assess global cognitive evaluations of one's life. Participants responded on a 7-point Likert scale, ranging from 1 = strongly disagree to 7 = strongly agree. The scale was previously translated and culturally adapted for the Romanian population by Stevens and colleagues (2012), showing adequate psychometric properties.

The Scale of the Experience of Meaning in Life (SEM) was developed for the present study in order to assess the broader existential experience of meaning from an integrative psychological and philosophical perspective. The initial item pool consisted of 40 items formulated to reflect several theoretically relevant components of existential orientation, including meaning and direction, authenticity and personal identity, relational embeddedness, axiological orientation, freedom, responsibility, and the integration of limit experiences. The purpose of the present study was to examine the empirical organization of these components, to identify the latent factorial structure of the instrument, and to assess its preliminary reliability and construct validity in a Romanian adult sample.

## 3. Results

### 3.1 Exploratory Factor Analysis

To examine the latent structure of the Scale of the Experience of Meaning in Life (SEM), an exploratory factor analysis was conducted using Principal Axis Factoring. The Kaiser criterion initially suggested the extraction of nine factors with eigenvalues greater than 1. However, inspection of the scree plot indicated a clear dominant first factor and a marked decrease in eigenvalues after the third/fourth factor, suggesting that the empirical structure was more parsimonious than the initial Kaiser solution. The first factor explained 30.09% of the variance after extraction, while the second, third, and fourth factors explained 8.46%, 4.10%, and 3.09%, respectively. Subsequent factors each contributed less than 3% of the variance.

Inspection of the factor matrix indicated that most items loaded primarily on a broad general factor reflecting the global experience of meaning in life, including meaning and direction, authenticity, relational embeddedness, value orientation, and responsibility. The initially proposed five-dimensional structure was therefore not supported by the empirical data. A small secondary component was identified for items referring to the acceptance and integration of suffering and limit experiences. However, given the limited number of items and the weak associations of this component with the general SEM factor and the external validation variables, this dimension was interpreted as complementary rather than central to the final structure of the instrument.

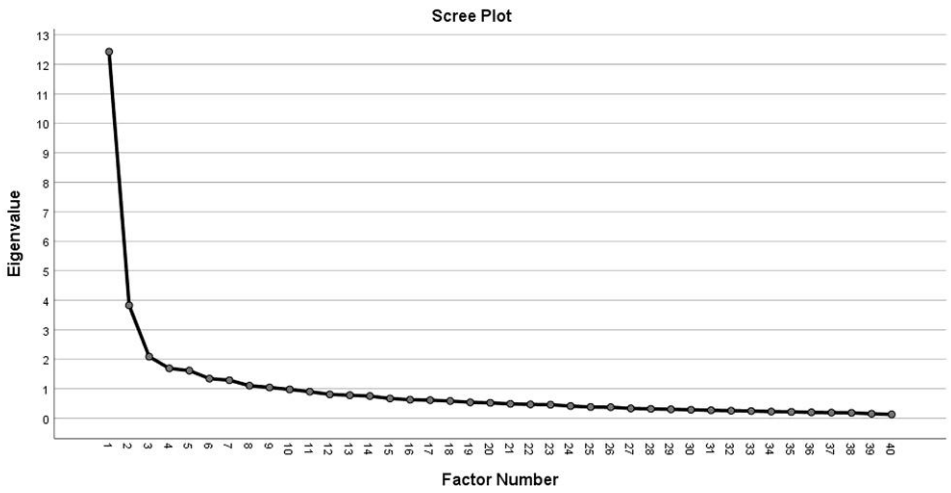
**Table 1. Exploratory Factor Analysis**

| Factor | Initial eigenvalue | % of variance | Cumulative % | Extraction total | Extraction % of variance | Extraction cumulative % |
|---|---|---|---|---|---|---|
| 1 | 12.426 | 31.066 | 31.066 | 12.034 | 30.085 | 30.085 |
| 2 | 3.828 | 9.569 | 40.635 | 3.383 | 8.457 | 38.542 |
| 3 | 2.084 | 5.210 | 45.844 | 1.639 | 4.098 | 42.640 |
| 4 | 1.689 | 4.222 | 50.066 | 1.238 | 3.094 | 45.734 |
| 5 | 1.613 | 4.032 | 54.099 | 1.178 | 2.945 | 48.679 |
| 6 | 1.342 | 3.356 | 57.454 | .886 | 2.214 | 50.894 |
| 7 | 1.286 | 3.215 | 60.669 | .836 | 2.091 | 52.984 |
| 8 | 1.101 | 2.753 | 63.422 | .678 | 1.696 | 54.680 |
| 9 | 1.040 | 2.601 | 66.023 | .573 | 1.433 | 56.113 |

*Note. Extraction method: Principal Axis Factoring.*

*Source: Authors' calculations based on the study data.*

**Figure 1. Scree Plot of the Exploratory Factor Analysis**




*Source: Authors' calculations based on the study data.*

### 3.2 Reliability (Internal Consistency)

Internal consistency was examined using Cronbach's alpha coefficients for all scales included in the study. The Satisfaction With Life Scale showed good internal consistency, α = .85. The two MLQ dimensions also showed adequate to excellent reliability, with α = .83 for Presence of Meaning and α = .93 for Search for Meaning. For the newly developed SEM, the general factor of the experience of meaning in life

demonstrated excellent internal consistency, α = .94, indicating a high level of item homogeneity. The secondary component referring to the integration of suffering and limit experiences, composed of three items, showed acceptable internal consistency, α = .72.

### 3.3 Validity

Preliminary evidence of construct validity was examined through Pearson correlations among the SEM scores, integration of suffering, life satisfaction, presence of meaning, and search for meaning. The general SEM factor correlated positively and significantly with life satisfaction, r = .56, p < .01, and presence of meaning, r = .66, p < .01, and negatively with search for meaning, r = −.34, p < .01. These associations support the convergent validity of the SEM and indicate that individuals with a stronger experience of meaning in life tend to report higher life satisfaction, a clearer presence of meaning, and a lower need to actively search for meaning.

The integration of suffering component showed weak but significant positive correlations with the general SEM factor, r = .24, p < .01, life satisfaction, r = .19, p < .01, and presence of meaning, r = .21, p < .01. Its association with search for meaning was not statistically significant, r = .12, p = .06. This pattern suggests that the integration of suffering is related to existential functioning, but does not belong to the central psychometric core of the SEM. Therefore, this component was interpreted as complementary and was not retained as part of the final general structure of the scale.

**Table 2. Correlations Among Variables**

| Variable | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| 1. Experience of meaning in life | | | | |
| 2. Integration of suffering | .24** | | | |
| 3. Life satisfaction | .56** | .19** | | |
| 4. Presence of meaning | .66** | .21** | .61** | |
| 5. Search for meaning | −.34** | .12 | −.08 | −.19** |

*Note. **p < .01.*

*Source: Authors' calculations based on the study data.*

### 3.4 Exploratory Analyses by Gender and Age

Additional exploratory analyses were conducted to examine whether the main study variables differed by gender or were associated with age. Independent-samples *t* tests indicated no significant gender differences in the general experience of meaning in life, life satisfaction, presence of meaning, or search for meaning. The only significant gender difference was observed for the integration of suffering, with women reporting higher scores than men, $t(230) = 2.50$, $p = .013$. Given that this component was interpreted as complementary rather than central to the SEM structure, this result should be considered exploratory.

Pearson correlations indicated that age was positively but weakly associated with life satisfaction, $r = .175$, $p = .007$, and presence of meaning, $r = .146$, $p = .027$. Age was not significantly associated with the general experience of meaning in life, integration of suffering, or search for meaning. Overall, these findings suggest that

gender and age showed limited associations with the main constructs examined in the study and do not substantially alter the interpretation of the SEM as a general measure of the experience of meaning in life.

## 4. Discussion

The present study aimed to develop and preliminarily validate the Scale of the Experience of Meaning in Life (SEM), an instrument designed to assess the broader existential experience of meaning in a Romanian adult sample. The findings partially supported the theoretical assumptions underlying the construction of the scale, while also clarifying its empirical structure. Although the initial item pool was developed to reflect several theoretically relevant existential components, the exploratory factor analysis indicated the predominance of a robust general factor rather than a clearly differentiated multidimensional structure. This result suggests that the experience of meaning in life, as assessed by the SEM, is best understood at this preliminary stage as a global existential orientation integrating meaning and direction, authenticity, relational embeddedness, value orientation, freedom, and personal responsibility.

The internal consistency results support the reliability of the SEM. The general factor showed excellent reliability, indicating a high level of item homogeneity and suggesting that the retained items measure a coherent construct. The pattern of correlations also provided preliminary evidence of construct validity. The general SEM factor was positively associated with life satisfaction and presence of meaning and negatively associated with search for meaning. These results are consistent with the theoretical expectation that individuals with a more consolidated experience of meaning tend to report higher subjective well-being, a clearer sense of existential direction, and a lower need to actively search for meaning.

A distinct finding concerns the component related to the integration of suffering and limit experiences. Although this component showed acceptable internal consistency, its correlations with the general SEM factor and with external validation variables were relatively weak. This suggests that the integration of suffering is conceptually related to existential functioning, but does not represent a central dimension of the experience of meaning in life as measured by the SEM. Rather, it may reflect a complementary existential process, potentially associated with resilience, post-traumatic growth, or the capacity to transform adverse experiences into personal development. For this reason, the integration of suffering should be reconsidered in future studies as a distinct or associated construct, rather than as part of the core structure of the SEM.

The exploratory analyses by gender and age did not substantially change the interpretation of the main findings. Gender differences were generally non-significant, except for integration of suffering, where women reported higher scores. Age was weakly associated with life satisfaction and presence of meaning, but not with the general SEM factor. These results suggest that the SEM primarily captures a general existential orientation that is not strongly dependent on gender or age in the present sample, although future studies should examine measurement invariance across demographic groups.

Overall, the findings support the SEM as a promising preliminary measure of the experience of meaning in life. At the same time, they indicate that further psychometric refinement is needed, particularly through confirmatory factor analysis, test–retest reliability, and validation on larger and more balanced samples.

### 4.1 Theoretical and Practical Implications

The findings have several theoretical implications for the assessment of meaning in life. First, the predominance of a robust general factor suggests that the experience of meaning in life may function, at least in the present sample, as a global existential orientation rather than as a set of clearly differentiated dimensions. This result is consistent with previous concerns regarding conceptual overlap and factorial instability in the measurement of meaning and purpose in life (Schultz, 2015; Debats et al., 1993; Harris and Standard, 2001; Yockey, 2006). The SEM therefore contributes to this literature by proposing an integrative measurement model centered on meaning, authenticity, relational embeddedness, values, freedom, and responsibility. Second, the relatively peripheral position of the integration of suffering component suggests that limit experiences may be theoretically relevant to existential functioning, but psychometrically distinct from the core experience of meaning in life. Future research should clarify whether this component is better conceptualized as a predictor, correlate, or outcome of meaning in life.

From an applied perspective, the SEM may provide a useful preliminary tool for assessing the general level of existential integration in Romanian adult samples. In counseling, psychotherapy, educational settings, or personal development contexts, the scale could help identify individuals' perceived orientation toward meaning, authenticity, values, and responsibility. However, given the preliminary nature of the present validation, the SEM should not yet be used as a diagnostic instrument or as a stand-alone measure for clinical decision-making. Its practical utility should be further examined in future studies, particularly through longitudinal designs, intervention studies, and validation across diverse populations. Used cautiously, the SEM may support future research and applied work focused on meaning-centered psychological assessment and intervention.

### 4.2 Limitations and Future Directions

The present study has several limitations that should be considered when interpreting the findings. First, the cross-sectional design does not allow causal conclusions regarding the associations between the experience of meaning in life, life satisfaction, presence of meaning, and search for meaning. The same design also prevented the assessment of test–retest reliability; therefore, the temporal stability of the SEM remains to be examined in future longitudinal research. Second, the study was based on a convenience sample that was predominantly female and highly educated, which limits the generalizability of the findings. Future studies should use larger, more balanced, and more diverse samples in order to examine whether the factorial structure and psychometric properties of the SEM remain stable across gender, age, educational level, and other socio-cultural groups. Third, the present sample size did not allow a robust confirmatory factor analysis. Future research should test the one-factor structure identified in the present study using confirmatory factor analysis and should compare it with alternative models, including bifactor or hierarchical solutions.

Finally, future studies should examine measurement invariance, test–retest reliability, sensitivity to change, and the predictive validity of the SEM in relation to relevant outcomes such as psychological well-being, resilience, mental health, and adaptation to adverse life experiences. These steps are necessary before the SEM can be recommended for broad clinical or applied use.

## 5. References


1. Akın, A., Hamedoğlu, M. A., Kaya, Ç., et al. (2013). Turkish version of the Work and Meaning Inventory (WAMI): Validity and reliability study. Journal Of European Education, 3(2), 11–16.
2. Alfuqaha, O. A., Al-Hammouri, M. M., Rababah, J. A., et al. (2022). Psychometric properties of the Arabic version of the Existence Scale. PLOS ONE, 17(4), e0267321. Available at: https://doi.org/10.1371/journal.pone.0267321
3. Buzea, C., and Dimitrova, R. (2017). Positive affect and the experience of meaning in life among Romanian emerging adults. In R. Dimitrova (Ed.), Well-being of youth and emerging adults across cultures (Cross-cultural advancements in positive psychology, Vol. 12, pp. 95–112). Springer. Available at: https://doi.org/10.1007/978-3-319-68363-8_7
4. Carreño, D. F., Eisenbeck, N., Cangas, A. J., et al. (2020). Spanish adaptation of the Personal Meaning Profile-Brief: Meaning in life, psychological well-being, and distress. International Journal of Clinical and Health Psychology, 20(2), 151–162. Available at: https://doi.org/10.1016/j.ijchp.2020.02.003
5. Crumbaugh, J. C. (1968). Cross-validation of Purpose-in-Life Test based on Frankl's concepts. Journal of Individual Psychology, 24(1), 74–81.
6. Damásio, B. F., and Koller, S. H. (2015). Meaning in Life Questionnaire: Adaptation process and psychometric properties of the Brazilian version. Revista Latinoamericana de Psicología, 47(3), 185–195. Available at: https://doi.org/10.1016/j.rlp.2015.06.004
7. Damásio, B. F., Koller, S. H., and Schnell, T. (2013). Sources of Meaning and Meaning in Life Questionnaire (SoMe): Psychometric properties and sociodemographic findings in a large Brazilian sample. Acta de Investigación Psicológica, 3(3), 1205–1227. Available at: https://doi.org/10.1016/S2007-4719(13)70961-X
8. Debats, D. L., van der Lubbe, P. M., and Wezeman, F. R. A. (1993). On the psychometric properties of the Life Regard Index (LRI): An evaluation in three independent samples based on the Dutch version. Personality and Individual Differences, 14(2), 337–345.
9. Diener, E., Emmons, R. A., Larsen, R. J., et al. (1985). The Satisfaction With Life Scale. Journal of Personality Assessment, 49(1), 71–75. Available at: https://doi.org/10.1207/s15327752jpa4901_13
10. Harris, A. H. S., and Standard, S. (2001). Psychometric properties of the Life Regard Index–Revised: A validation study of a measure of personal meaning. Psychological Reports, 89(3), 759–773.
11. Kállay, É., and Rus, C. L. (2015). An analysis of the psychometric properties of life Regard Index—Revised in two Romanian samples. Cognition, Brain, Behavior: An Interdisciplinary Journal, 19(2), 129–148.

12. Längle, A., Orgler, C., and Kundi, M. (2003). The Existence Scale: A new approach to assess the ability to find personal meaning in life and to reach existential fulfilment. European Psychotherapy, 4(1), 135–151.
13. McDonald, M. J., Wong, P. T., and Gingras, D. T. (2013). Meaning-in-life measures and development of a brief version of the Personal Meaning Profile. In The human quest for meaning (pp. 357-382). Routledge.
14. Morgan, J., and Farsides, T. (2009). Psychometric evaluation of the Meaningful Life Measure. Journal of Happiness Studies, 10(3), 351–366. Available at: https://doi.org/10.1007/s10902-008-9093-6
15. Peltomäki, I., Ojalammi, J., Palmi, N., et al. (2024). The Sources of Meaning and Meaning in Life (SoMe) questionnaire in Finnish: Sociodemographic findings of meaningfulness and crisis of meaning in the Finnish context. Scandinavian Journal of Psychology, 65(4), 758–767. Available at: https://doi.org/10.1111/sjop.13019
16. Rose, L. M., Zask, A., and Burton, L. J. (2017). Psychometric properties of the Meaning in Life Questionnaire (MLQ) in a sample of Australian adolescents. International Journal of Adolescence and Youth, 22(1), 68–77. Available at: https://doi.org/10.1080/02673843.2015.1124791
17. Schnell, T. (2009). The Sources of Meaning and Meaning in Life Questionnaire (SoMe): Relations to demographics and well-being. The Journal of Positive Psychology, 4(6), 483–499. Available at: https://doi.org/10.1080/17439760903271074
18. Schulenberg, S. E., and Melton, A. M. (2010). A confirmatory factor-analytic evaluation of the purpose in life test: Preliminary psychometric support for a replicable two-factor model. Journal of happiness studies, 11(1), 95-111. Available at: https://doi.org/10.1007/s10902-008-9124-3
19. Schulenberg, S. E., Schnetzer, L. W., and Buchanan, E. M. (2011). The Purpose in Life Test–Short Form: Development and psychometric support. Journal of Happiness Studies, 12(5), 861–876. Available at: https://doi.org/10.1007/s10902-010-9231-9
20. Schultz, D. (2015). Measuring purpose in life: A review. Graduate Student Journal of Psychology, 16, 5–24.
21. Schutte, L., Brdar, I., Wissing, M. P., et al. (2023). Measurement invariance of the Meaning in Life Questionnaire across 17 countries. Applied Research in Quality of Life, 18(3), 1491–1519. Available at: https://doi.org/10.1007/s11482-023-10150-7
22. Shahhosseini, Z., Azizi, M., Marzband, R., et al. (2022). Psychometric Properties of the Persian Version of the Personal Meaning Profile in Iran. Journal of religion and health, 61(4), 3443-3457. Available at: https://doi.org/10.1007/s10943-021-01468-3
23. Sørensen, T., la Cour, P., Danbolt, L. J., et al. (2019). The Sources of Meaning and Meaning in Life Questionnaire in the Norwegian Context: Relations to mental health, quality of life, and self-efficacy. The International Journal for the Psychology of Religion, 29(1), 32–45. Available at: https://doi.org/10.1080/10508619.2018.1547614
24. Steger, M. F., Frazier, P., Oishi, S., et al. (2006). The Meaning in Life Questionnaire: Assessing the presence of and search for meaning in life. Journal of Counseling

Psychology, 53(1), 80–93. Available at: https://doi.org/10.1037/0022-0167.53.1.80
25. Stevens, M. J., Lambru, I., Sandu, C. G., et al. (2012). Romanian adaptation of the Satisfaction with Life Scale. Journal of Psychological and Educational Research, 20(1), 17.
26. Temane, Q. M., Khumalo, I. P., and Wissing, M. P. (2014). Validation of the Meaning in Life Questionnaire in a South African context. Journal of Psychology in Africa, 24(1), 51–60. Available at: https://doi.org/10.1080/14330237.2014.904088
27. Van Ranst, N., and Marcoen, A. (1997). Meaning in life of young and elderly adults: An examination of the factorial validity and invariance of the Life Regard Index. Personality and Individual Differences, 22(6), 877–884.
28. Voicu, F. M. (2024). Meaning, satisfaction, and quality of life in older adulthood: a comparative study between elders in residential centers and those living independently. Anthropological Researches and Studies, (14), 323-340.
29. Yockey, R. D. (2006). Confirmatory factor analysis of the Life Regard Index–Revised.

# The Structure of National Identity in Post-War Kosovo: A Layered and Hybrid Configuration

**Camelia Cristina KOJQIQI**
PhD Student, University of Craiova (Romania)
Email: cckojqiqi@hotmail.com

**Ștefan Eugen BRUNO**
PhD Professor, National University of Science and Technology
POLITEHNICA Bucharest (Romania)
Email: bruno.stefan@upb.ro

***Abstract***: *This paper examines how national identity is structured among Albanians in post-war Kosovo. Rather than treating identity as a fixed or binary category, the article approaches it as a historically produced and socially organized form of belonging, shaped by the interaction between ethnocultural memory, civic statehood, and religion. Drawing on survey data from 400 Albanian respondents in Kosovo, the study analyses identity through national dominance, identity ordering, and a combined hybrid typology. The findings show that national identity is not fragmented between Albanian, Kosovar, and religious belonging, but arranged through a clear hierarchy. Most respondents prioritized national belonging, while religion remains present but generally secondary. The results suggest that post-war Kosovo has not produced a replacement of Albanian identity by Kosovar identity, nor a displacement of national belonging by religion. Instead, it has produced a composite structure in which older ethnocultural attachments and newer civic-territorial forms of belonging coexist within a predominantly national-first identity framework.*

***Keywords:*** *national identity; hybrid identity; identity hierarchy; religion and belonging; Kosovo*

## 1. Introduction

The question of national identity in Kosovo emerges from a historical and political context in which state consolidation has been contested, delayed, and externally mediated. Kosovo's post-war transformation after 1999, followed by the declaration of independence in 2008, reshaped not only institutions and governance, but also the way in which belonging is articulated and understood (Judah, 2000). This process remains unfinished, as Kosovo continues to face partial international recognition, unresolved relations with Serbia, and ongoing pressures related to governance, the rule of law, and European integration (European Commission, 2024; Freedom House, 2024). Kosovo's contested status therefore remains a field of legal, diplomatic, and political negotiation, where recognition is linked not only to international law, but also to state-building strategy and political legitimacy (Çerkini and Haxhimehmeti, 2025; Newman and Visoka, 2018).

In this context, national identity cannot be treated as a stable inheritance or as a simple category of self-description, but is better understood as a process shaped by historical experience, institutional change, and the social conditions that influence how individuals position themselves (Brubaker, 2004; Wimmer, 2013; Otovescu, 2026). The present paper examines how national identity is structured among Albanians in Kosovo, arguing that identity is not organised as a binary opposition between Albanian

and Kosovar belonging, nor as a direct opposition between nation and religion. Rather, it operates as an ordered configuration in which ethnocultural, civic-territorial, and religious dimensions coexist but do not carry equal weight.

Kosovo offers a specific case of post-conflict identity formation. Albanian identity remains deeply rooted in language, collective memory, and experiences of political repression, while Kosovar identity has gained meaning through sovereignty, citizenship, institutions, and territorial belonging. At the same time, recent demographic and political developments show that identity continues to unfold within changing social conditions, shaped by demographic decline, governance challenges, and continuing reform pressures (Associated Press, 2024; Kosovo Agency of Statistics [KAS], 2024; European Commission, 2024).

Religion, particularly Islam, adds a further dimension to this analysis. Kosovo remains a Muslim-majority society, with the 2024 census reporting a strong Muslim majority alongside smaller Christian and non-religious communities (Associated Press, 2024; KAS, 2024). However, the presence of religion in the social structure does not necessarily mean that religion occupies the primary position in national identity. The central question is therefore not only whether religion matters, but whether it functions as a dominant marker of belonging or as a secondary layer embedded within national identification. By examining national dominance, identity ordering, and combined hybrid typologies, this paper clarifies how national identity is structured among Kosovo Albanians in the post-war period.

## 2. Theoretical Framework: Constructed and Layered Belonging

The interpretation of identity adopted in this paper is grounded in the understanding that national belonging is neither natural nor fixed, but historically produced, socially maintained, and institutionally mediated. National identity is approached as a constructed form of collective belonging, not in the sense that it is artificial or superficial, but because it becomes meaningful through repeated narratives, shared symbols, historical memories, territorial attachments, and everyday practices (Anderson, 1983; Smith, 1991). Anderson's (1983) concept of the nation as an imagined community is particularly useful in this respect, as it explains how individuals who do not know each other personally can nevertheless experience themselves as belonging to the same collective body.

National identity also persists in ordinary political life, not only during moments of crisis. Bonikowski (2016) shows that nationalism can operate as a routine framework of meaning, shaping how individuals interpret belonging, solidarity, and political community even in relatively stable settings. This is relevant to Kosovo because national belonging is not activated only by conflict, but also reproduced through everyday attachments, institutions, and collective narratives.

Recent theoretical work also confirms that nationalism should not be reduced to a single ideological form (Wimmer, 2013). Mylonas and Tudor (2023) argue that nationalism varies according to communities, narratives, and identities, showing that national belonging can be organised differently depending on historical context, political institutions, and social boundaries. This is important for Kosovo because Albanian and Kosovar identification do not operate as simple alternatives, but as interconnected ways of imagining belonging.

In Kosovo, this imagined dimension is particularly complex because national belonging is not organised around a single narrative. The Albanian dimension is rooted in language, ancestry, collective memory, and the historical experience of exclusion, resistance, and political mobilisation (Malcolm, 1998; Vickers, 1998). By contrast, the Kosovar dimension is more directly connected to territory, institutions, citizenship, and the post-1999 process of state-building (Judah, 2000; Ramet, 2006; European Commission, 2024). These two dimensions do not necessarily cancel each other out. Instead, they coexist and are often combined, although not always with the same intensity or priority.

Ethno-symbolist approaches help explain why older forms of belonging remain powerful even when new political institutions emerge. Smith (1991) argues that modern nations are not created from nothing, but draw upon earlier ethnic communities, myths of origin, historical memories, symbols, and cultural continuities. This perspective is particularly relevant to Kosovo, where Albanian identity continues to function as a central ethnocultural framework. Language, historical memory, kinship narratives, and collective experiences of repression have contributed to the persistence of Albanian identification as a deeply rooted form of belonging (Malcolm, 1998; Vickers, 1998). For this reason, the emergence of Kosovar civic identity after the war did not erase Albanian ethnocultural identity, but developed alongside it.

However, ethno-symbolism alone cannot fully explain the contemporary structure of identity in Kosovo, as it places greater emphasis on historical continuity than on institutional transformation. Constructivist and relational approaches are therefore also necessary. Brubaker (2004) argues that identity should not be treated as a fixed group essence, but as a category that is activated, negotiated, and institutionalised in specific contexts. Wimmer (2013) similarly demonstrates that ethnic and national boundaries are not static, but are produced and reproduced through political institutions, social interactions, and struggles over inclusion and exclusion. Applied to Kosovo, this means that identity is not simply inherited from the past, but continuously reconfigured through post-war governance, education, citizenship practices, international administration, and everyday social relations (Judah, 2000; Ramet, 2006).

Recent work on Kosovo further supports this interpretation. Nones (2025) shows that nationalism in Kosovo can incorporate apparently contradictory institutional arrangements into wider narratives of sovereignty and European orientation. Similarly, Çerkini and Haxhimehmeti (2025) underline that recognition remains shaped by nationalist narratives, diplomatic strategy, and political legitimacy. These studies reinforce the point that identity in Kosovo is not static, but adapts to institutional constraints and geopolitical conditions.

Religion adds another layer to this configuration. In Kosovo, Islam is historically embedded through the Ottoman period and remains an important element of social and cultural life (Clayer, 2007; Duijzings, 2000; Malcolm, 1998). However, its role in national identity is not straightforward. Religion does not simply replace national belonging, nor does it necessarily stand in opposition to it. Instead, it often functions as a secondary or activated layer, becoming more visible under specific social or personal conditions (Duijzings, 2000). For this reason, the key question is not only

whether religion matters, but whether it occupies a primary or secondary position within the identity hierarchy.

The relationship between religion and nationalism also needs to be treated carefully. Brubaker (2012) argues that religion and nationalism may overlap in several ways: they can operate as analogous forms of belonging, become intertwined in political projects, or reinforce one another without becoming identical. This approach is useful for Kosovo because Islam may be socially present and historically embedded without necessarily becoming the dominant foundation of national identity.

This framework allows identity to be understood as a structured configuration rather than as a binary choice. National identity in Kosovo is shaped by three interconnected dimensions: an ethnocultural dimension linked to Albanian language, memory, and historical continuity; a civic-territorial dimension linked to Kosovo's statehood, institutions, and citizenship; and a religious dimension linked to Islamic belonging and inherited cultural practices. These dimensions coexist, but are not equally dominant for all individuals, and their interaction produces different identity profiles depending on which layer is prioritised and which remains secondary.

## 3. Historical and Structural Context of Identity Formation

The structure of national identity in Kosovo cannot be separated from the historical processes that have shaped the region. Rather than developing in a linear or homogeneous manner, identity formation reflects a cumulative process in which successive political regimes, religious frameworks, and institutional transformations have contributed distinct forms of belonging (Smith, 1991). These formations did not simply replace one another, but remained embedded in social memory, cultural practices, and everyday identification (Wimmer, 2013).

Before the Ottoman period, an important historical dimension was formed through the Slavic migrations and the later expansion of medieval Serbian ecclesiastical and political authority. From the sixth century onwards, Slavic movements altered the demographic, linguistic, and political landscape of the region, while the later incorporation of Kosovo into medieval Serbian structures strengthened Orthodox institutional influence (Malcolm, 1998; Fine, 1994). In this context, parts of the local population were gradually incorporated into Orthodox religious and administrative frameworks, a process often accompanied by linguistic and onomastic adaptation, including the use of Slavicised personal names and place names (Malcolm, 1998; Fine, 1994). This pre-Ottoman dimension is significant because it shows that identity transformation in Kosovo did not begin with Ottoman Islamisation, but was already shaped by earlier processes of political incorporation, religious reclassification, and cultural adaptation (Fine, 1994; Malcolm, 1998; Vickers, 1998).

The Ottoman period added another major historical stratum by reorganising social life through religious affiliation, administrative belonging, and imperial governance (Malcolm, 1998; Clayer, 2007). Within the Ottoman system, Islam became not only a religious faith, but also a social and institutional marker that influenced community organisation, legal status, education, and access to authority (Clayer, 2007; Duijzings, 2000). This did not erase Albanian linguistic and cultural belonging, but introduced a further religious dimension that became historically embedded in Kosovo's social fabric (Malcolm, 1998). Consequently, Islam should not be understood

only as a private belief system, but also as a historical force that shaped social relations, collective boundaries, and inherited cultural practices (Clayer, 2007; Duijzings, 2000).

The end of Ottoman rule did not eliminate these earlier religious and cultural legacies, but transformed the conditions under which identity was expressed (Malcolm, 1998). Under Serbian and later Yugoslav rule, Albanian identity in Kosovo was repeatedly placed under political pressure, while in the interwar period, state policies were marked by centralisation, demographic intervention, and attempts to weaken Albanian political and cultural presence (Malcolm, 1998; Vickers, 1998). Identity during this phase was therefore shaped through exclusion and resistance, as Albanian belonging became increasingly connected to language, kinship, memory, and the defence of collective continuity (Vickers, 1998).

The socialist Yugoslav period introduced a more ambivalent framework. On the one hand, Kosovo gained a degree of institutional recognition, particularly after the constitutional reforms of the 1970s, which strengthened autonomy and allowed wider use of the Albanian language, education, and cultural institutions (Judah, 2000; Ramet, 2006). On the other hand, this recognition remained constrained within the Yugoslav federal system and did not amount to full republican status (Ramet, 2006). As a result, Albanian identity was both institutionalised and limited, expressed through education, cultural production, and political mobilisation, while still remaining structurally subordinated (Judah, 2000; Ramet, 2006).

The 1990s represented a critical rupture in this historical trajectory, as the revocation of Kosovo's autonomy, the exclusion of Albanians from public institutions, and the development of parallel educational, political, and social structures intensified the politicisation of identity (Judah, 2000). During this period, national belonging became closely tied to collective survival, resistance, and the defence of dignity (Vickers, 1998). The experience of repression and war reinforced Albanian ethnonational identification, while weakening trust in state institutions associated with Serbian domination (Judah, 2000; Vickers, 1998). In this context, identity was not simply cultural, but deeply political and existential (Judah, 2000).

The post-1999 period introduced a further dimension into this already complex configuration. International administration, followed by the declaration of independence in 2008, created the conditions for the emergence of a civic-territorial identity linked to Kosovo as a state (Ramet, 2006). This Kosovar identity is associated with institutions, citizenship, territory, and the symbolic project of statehood (Wimmer, 2013). Rather than replacing Albanian ethnocultural identity, it developed alongside it, producing a dual structure in which many individuals identify simultaneously with Albanian ethnonational belonging and Kosovar civic-territorial belonging (Judah, 2000; Wimmer, 2013). Civic-territorial identity in Kosovo is closely tied to state-building and contested recognition, where citizenship, institutions, and diplomatic recognition become central mechanisms through which political belonging is constructed (Krasniqi, 2015; Newman and Visoka, 2018). The relationship between these identities is therefore not one of simple opposition, but of ordering, combination, and hierarchy (Wimmer, 2013).

Beyond these historical developments, national identity in Kosovo is embedded in broader structural domains (Wimmer, 2013). Cultural practices, particularly language, folklore, customary traditions, symbols, and collective memory,

sustain Albanian belonging across generations (Smith, 1991; Assmann, 2011). Demographic patterns, including age, migration, urban-rural residence, and diaspora connections, shape the social distribution of identity and influence how belonging is reproduced inside and outside the territory (Brubaker, 2004; Wimmer, 2013). Diaspora connections also matter because Kosovo's post-conflict state-building has been shaped not only from within the territory, but also through transnational forms of mobilisation, support, and political engagement (Koinova, 2018). Institutional arrangements, especially education, governance, and public administration, mediate identity by defining how citizens encounter the state in everyday life (Wimmer, 2013). Economic conditions, including employment, inequality, migration, and dependence on remittances, also influence identity by shaping social mobility, expectations, and attachment to the homeland (Brubaker, 2004).

In this sense, identity in Kosovo is not only historically constituted, but also structurally reproduced (Wimmer, 2013). It is formed through the interaction between memory and institutions, culture and territory, religion and nation, exclusion and state-building (Smith, 1991; Assmann, 2011; Wimmer, 2013). The contemporary structure of identity therefore reflects the coexistence of several historical formations: a pre-Ottoman Slavic-Orthodox dimension, an Ottoman Islamic legacy, a Yugoslav institutional and political inheritance, a conflict-based ethnonational memory, and a post-independence civic-territorial project (Malcolm, 1998; Judah, 2000). These historical and structural foundations provide the basis for the empirical analysis that follows, where identity is examined not as a single category, but as a composite configuration.

## 4. Methodology

The empirical component of this study is based on a cross-sectional survey designed to examine how national identity is constructed among Kosovo Albanians in relation to ethnicity, civic belonging, and religion. The full study was conducted with participants aged 18 years and older who identified as Albanians from Kosovo. The data were collected through a non-probability sampling strategy, specifically snowball sampling, since random sampling was not feasible. Participants were first recruited through personal and professional networks and were then invited to share the questionnaire with other eligible respondents.

The survey was administered mainly online through Google Forms and distributed through Facebook, Instagram, WhatsApp, and Viber. Because this online strategy risked excluding older respondents, especially women over 70 with limited literacy or limited access to social media, a small number of questionnaires were completed manually in order to include this group. From 410 completed questionnaires, 400 valid responses were retained after incomplete or ineligible cases were removed.

The sample was designed to reflect diversity within the Kosovo Albanian population in terms of gender, age, education, residence, religion, and regional background. Respondents were drawn from urban and rural areas, including Pristina and other towns, as well as members of the diaspora and the final sample provides a sufficiently broad empirical foundation for descriptive analysis of identity patterns

among Kosovo Albanians. All responses were anonymised before statistical analysis, and the data were stored securely in accordance with GDPR principles.

The questionnaire was structured around several conceptual dimensions, with primary emphasis on national belonging and identity ordering. Respondents were asked to position themselves along the Albanian-Kosovar axis, allowing the identification of both exclusive and combined forms of national identification. This enabled the construction of a national dominance variable distinguishing between Albanian-dominant and Kosovar-dominant orientations. In parallel, the questionnaire examined the relative ordering between national and religious belonging, capturing whether respondents prioritised national identity, religious identity, or combined the two in different hierarchical forms.

These dimensions were then integrated into a combined hybrid identity typology linking national dominance with identity ordering. This approach allowed identity to be analysed not as a single category, but as a configuration reflecting the interaction between ethnocultural, civic-territorial, and religious dimensions. The resulting typology produced five categories: civic-ethnocultural hybrid, ethnocultural-religious hybrid, civic-religious hybrid, ethnocultural-civic hybrid, and religious-dominant identity. In this way, the analysis moves beyond simple identity labels and captures how respondents rank and combine different forms of belonging.

The statistical analysis was conducted in IBM SPSS Statistics using syntax. It began with descriptive frequency analysis, followed by the construction of composite variables and cross-tabulated typologies. While the broader doctoral study included additional modules on religiosity and attitudes towards religion in public life, the present article focuses only on the variables that directly capture the structure and hierarchy of identity. This focus is consistent with the aim of the paper, which is not to provide a full account of religiosity in Kosovo, but to examine how national and religious belonging are ordered within the identity structure.

The methodological design therefore reflects the theoretical argument of the article. If identity in Kosovo is layered and hybrid, it cannot be adequately measured through one isolated indicator. It must be operationalised through the relationship between several dimensions: whether respondents prioritise Albanian or Kosovar belonging, whether they place nation or religion first, and whether religion functions as a primary or secondary layer. The questionnaire was therefore designed not only to describe identity, but to make its internal organisation empirically visible.

## 5. The Structure of Identity

The empirical analysis was organised in four stages and is based on a sample of 400 respondents who self-identified as Albanians from Kosovo. The first stage consisted of descriptive statistical analysis of the socio-demographic characteristics of the sample. The distribution indicates a balanced gender composition (51.7% female; 48.3% male) and a relatively even spread across age groups, with 26.3% aged 18–30, 23.5% aged 31–50, 24.3% aged 51–70, and 26.0% aged over 70, allowing for the examination of generational variation in identity formation. In terms of residence, the majority of respondents are from urban areas (67.3%), while 32.8% reside in rural settings, capturing differences in social environment and exposure to institutional and cultural influences. The sample is predominantly Muslim (87.8%), with smaller

proportions identifying as Christian (8.3%), atheist (3.3%), or other (0.8%), reflecting the broader religious composition of the Albanian population in Kosovo. Educational attainment varies across the sample, with 40.8% having completed secondary education, 23.8% holding higher education degrees, and smaller proportions distributed across vocational training and lower levels of formal education. Overall, the socio-demographic profile indicates a socially heterogeneous sample, providing a sufficiently diverse empirical basis for analysing patterns of identity structure within the Kosovo Albanian population.

The second stage examined how respondents positioned themselves along the Albanian–Kosovar identity axis, identifying both exclusive and combined forms of national identification. The third stage analysed the ordering between national and religious belonging, capturing whether respondents prioritised national identity, religious identity, or combined the two in hierarchical forms. The last stage consisted of a cross-tabulation between national dominance and identity ordering, through which the combined hybrid identity typology was constructed as the main analytical variable of the study.

**Table 1. Distribution of Identity Type and National Dominance Ordering**

| Variable | Category | Frequency | Percent |
|---|---|---|---|
| Identity type | Albanian | 121 | 30.3 |
| | Kosovar | 73 | 18.3 |
| | Albanian then Kosovar | 104 | 26.0 |
| | Kosovar then Albanian | 102 | 25.5 |
| National dominance | Albanian / Albanian then Kosovar | 225 | 56.3 |
| | Kosovar / Kosovar then Albanian | 175 | 43.8 |

*Source: Author's survey data (N = 400).*

The frequency distribution presented in Table 1 shows that identity is not organised as a simple opposition between Albanian and Kosovar belonging. While 30.3% of respondents identify as Albanian and 18.3% as Kosovar, more than half of the sample combines both categories in ordered forms. Specifically, 26.0% identify as Albanian then Kosovar, while 25.5% identify as Kosovar then Albanian. When these responses are recoded into national dominance, Albanian-dominant identity accounts for 56.3% of the sample, compared with 43.8% for Kosovar-dominant identity. This indicates that Albanian identity remains slightly stronger, but the wider pattern points to combination rather than polarisation.

**Table 2. Distribution of National and Religious-First Identity Ordering**

| Identity ordering | Frequency | Percent |
|---|---|---|
| National-first identity | 357 | 89.3 |
| Religious-first identity | 35 | 8.8 |
| Religious-only identity | 8 | 2.0 |

*Source: Author's survey data (N = 400).*

The second frequency analysis, presented in Table 2, examined whether respondents placed national or religious belonging first. The results show a strong predominance of national-first identity, with 89.3% of respondents placing national belonging before religion. By contrast, only 8.8% placed religion first, while 2.0% defined themselves only through religion. This indicates that religion is present within the identity structure, but rarely functions as the primary identity marker. Its role is therefore better understood as secondary or embedded within national belonging.

The final step consisted of a cross-tabulation between national dominance and identity ordering. This procedure produced the combined hybrid identity typology, allowing the analysis to identify how ethnocultural, civic-territorial, and religious dimensions are arranged within the same identity structure.

**Table 3. Combined Hybrid Identity Typology**

| Combined hybrid identity type | Frequency | Percent |
|---|---|---|
| Civic-ethnocultural hybrid (Kosovar + national-first) | 163 | 40.8 |
| Ethnocultural-religious hybrid (Albanian + religious-first) | 26 | 6.5 |
| Civic-religious hybrid (Kosovar + religious-first) | 9 | 2.3 |
| Ethnocultural-civic hybrid (Albanian + national-first) | 194 | 48.5 |
| Religious-dominant identity | 8 | 2.0 |

*Source: Author's survey data (N = 400).*

The combined typology confirms that identity is structured mainly through national belonging, but in two dominant forms. The largest category is the ethnocultural-civic hybrid, representing 48.5% of respondents. This group combines Albanian dominance with national-first ordering, indicating that Albanian ethnocultural belonging remains the strongest identity anchor for almost half of the sample. The second largest category is the civic-ethnocultural hybrid, representing 40.8% of respondents. This group combines Kosovar dominance with national-first ordering, suggesting that civic-territorial belonging has become a significant post-war identity layer.

Religious-first configurations are considerably smaller. The ethnocultural-religious hybrid accounts for 6.5% of respondents, while the civic-religious hybrid

represents only 2.3%. The religious-dominant category remains marginal at 2.0%. Taken together, these findings demonstrate that identity among Albanian respondents in Kosovo is not fragmented, but hierarchically ordered. Albanian and Kosovar identities are frequently combined, while religion is not absent, but usually positioned beneath national belonging. The empirical structure therefore supports the interpretation of post-war Kosovo identity as composite, ranked, and predominantly national-first.

## 6. Interpreting Hybrid Identity

The findings suggest that national identity among Albanian respondents in Kosovo is marked by complexity, but not by fragmentation. Albanian and Kosovar belonging do not appear as mutually exclusive positions; rather, they are combined and ranked in ways that reflect the historical and institutional conditions of post-war Kosovo. This is sociologically important because it shows that identity is not simply divided between ethnic and civic forms, but organised through different degrees of attachment and priority.

The predominance of national-first identities indicates that nationhood remains the primary framework through which belonging is articulated. For most respondents, religion does not replace national identity, nor does it appear as a competing centre of identification. Instead, it is incorporated beneath the national layer. This supports the argument that religion in Kosovo is historically and culturally meaningful, but not dominant in structuring national belonging for the majority of Albanian respondents. In this respect, Islam appears less as an alternative national identity and more as an inherited and socially embedded dimension that may become more visible in certain contexts, without overturning the primacy of national identification.

The two largest identity categories further clarify this structure. The ethnocultural-civic hybrid, which combines Albanian dominance with national-first ordering, reflects the continued strength of Albanian ethnocultural identity. This form of belonging is anchored in language, historical memory, kinship, collective experience, and the political struggles that shaped Kosovo's twentieth-century trajectory. Its predominance suggests that the formation of the Kosovar state has not erased the Albanian identity framework, but has been incorporated into it as an additional civic and territorial layer.

At the same time, the civic-ethnocultural hybrid demonstrates that Kosovar identity has consolidated as a meaningful post-war category. This does not mean that respondents who prioritise Kosovar identity abandon Albanian belonging. Rather, they appear to place the civic-territorial dimension first while still retaining an ethnocultural connection. This pattern reflects the post-1999 and post-independence context, in which institutions, citizenship, territorial sovereignty, and state-building have created a new framework for imagining belonging. Kosovar identity should therefore not be interpreted as a rejection of Albanian identity, but as a reordering of the identity hierarchy.

The smaller religious-first categories are also meaningful because they show the limits of religious activation within the identity structure. The ethnocultural-religious and civic-religious groups demonstrate that religion can become a prioritised

identity layer for some respondents, but its numerical weight remains limited. The marginal size of the religious-dominant category further suggests that exclusive religious identification is not a central pattern among the Albanian population included in this study. This finding is important in relation to post-war debates on Islam in Kosovo, because it shows that increased religious visibility does not necessarily translate into religious dominance in national identity construction.

Overall, the findings point to stability within complexity. The structure is complex because it contains ethnocultural, civic-territorial, and religious dimensions. Yet it is also stable because these dimensions are not randomly combined; they follow a clear hierarchy in which national belonging occupies the primary position. The main distinction is therefore not between nation and religion, but between different ways of ordering Albanian and Kosovar belonging within a predominantly national-first framework.

From a theoretical perspective, these results support a constructivist and relational interpretation of identity. National identity in Kosovo is not fixed, but neither is it undefined. It is produced through the interaction between historical memory, institutional change, and social positioning. The post-war period has not produced a replacement of Albanian identity by Kosovar identity, nor a displacement of national identity by religion. Instead, it has generated a hybrid structure in which older ethnocultural layers and newer civic-territorial layers coexist within a shared national framework.

This analysis could be extended by a comparative approach that includes other ethnic communities in Kosovo, providing a more complete understanding of how identity is structured across different social and institutional contexts. Longitudinal designs would also be particularly valuable, as they would make it possible to examine how identity configurations evolve over time, especially in relation to generational change, migration, and shifting political conditions. In addition, qualitative approaches, such as in-depth interviews or ethnographic observation, could complement the present findings by capturing the meanings, narratives, and situational expressions of identity that are not fully accessible through survey data. Taken together, these directions would contribute to a more nuanced understanding of identity as both a structured configuration and a lived social experience.

## 7. Conclusion

This study demonstrates that national identity in post-war Kosovo is not singular, nor divided, but structured through a layered and hierarchical arrangement of belonging. The coexistence of ethnocultural, civic-territorial, and religious dimensions reflects the historical and institutional conditions through which identity has developed.

The empirical findings show that Albanian and Kosovar identities are not mutually exclusive. They are frequently combined, but not always in the same order. Albanian ethnocultural belonging remains highly significant, while Kosovar civic identity has become an important post-war layer connected to statehood, territory, and citizenship. Religion remains present, but for most respondents it does not function as the dominant identity marker.

Rather than displacing earlier forms of belonging, new identity layers are incorporated into existing structures. In this sense, identity in Kosovo should be understood as an ongoing process of ordering and reordering, shaped by historical memory, institutional transformation, and contemporary social life. The case of Kosovo therefore contributes to broader debates on post-conflict societies by showing that identity formation after war does not necessarily produce fragmentation. It may instead generate composite and ranked forms of belonging, where continuity and change coexist within the same national framework.

**References:**


1. Anderson, B. (1983). *Imagined communities: Reflections on the origin and spread of nationalism*. London: Verso.
2. Assmann, J. (2011). *Cultural memory and early civilization: Writing, remembrance, and political imagination*. Cambridge: Cambridge University Press.
3. Associated Press. (2024, December 19). *Kosovo census shows shrinking population as many Serbs heed political party calls to boycott*. Available at: https://apnews.com/article/1c20ecb6b09fcf2f26342c1404c405ca.
4. Bonikowski, B. (2016). Nationalism in settled times. *Annual Review of Sociology*, 42, 427–449. Available at: https://doi.org/10.1146/annurev-soc-081715-074412.
5. Brubaker, R. (2004). *Ethnicity without groups*. Cambridge, MA: Harvard University Press.
6. Brubaker, R. (2012). Religion and nationalism: Four approaches. *Nations and Nationalism*, 18(1), 2–20. Available at: https://doi.org/10.1111/j.1469-8129.2011.00486.x.
7. Çerkini, Z., and Haxhimehmeti, G. (2025). Nationalism and political challenges in state recognition: Kosovo's legal and diplomatic journey. *Studies in Ethnicity and Nationalism*, 1–13. Available at: https://doi.org/10.1111/sena.70008.
8. Clayer, N. (2007). *Aux origines du nationalisme albanais: La naissance d'une nation majoritairement musulmane en Europe*. Paris: Karthala.
9. Duijzings, G. (2000). *Religion and the politics of identity in Kosovo*. London: Hurst.
10. European Commission. (2024). *Kosovo 2024 report*. Brussels: European Commission. Available at: https://enlargement.ec.europa.eu/kosovo-report-2024_en.
11. Fine, J. V. A. (1994). *The late medieval Balkans: A critical survey from the late twelfth century to the Ottoman conquest*. Ann Arbor, MI: University of Michigan Press.
12. Freedom House. (2024). *Kosovo: Nations in Transit 2024 country report*. Washington, DC: Freedom House. Available at: https://freedomhouse.org/country/kosovo/nations-transit/2024.
13. Judah, T. (2000). *Kosovo: War and revenge*. New Haven, CT: Yale University Press.
14. Koinova, M. (2018). Sending states and diaspora positionality in international relations. *International Political Sociology*, 12(2), 190–210. Available at: https://doi.org/10.1093/ips/oly008.
15. Kosovo Agency of Statistics. (2024). *Population and housing census in Kosovo 2024: Final results*. Pristina: Kosovo Agency of Statistics. Available at: https://askapi.rks-gov.net/Custom/bffbac3c-f325-4b18-b0e3-755dcb4cccf0.pdf.

16. Krasniqi, G. (2015). Citizenship as a tool of state-building in Kosovo: Status, rights, and identity in the new state. *Citizenship Studies*, 19(6–7), 715–729. Available at: https://doi.org/10.1080/13621025.2015.1053791.
17. Malcolm, N. (1998). *Kosovo: A short history*. London: Macmillan.
18. Mylonas, H., and Tudor, M. (2023). *Varieties of nationalism: Communities, narratives, identities*. Cambridge: Cambridge University Press. Available at: https://doi.org/10.1017/9781108973298.
19. Newman, E., and Visoka, G. (2018). The foreign policy of state recognition: Kosovo's diplomatic strategy to join international society. *Foreign Policy Analysis*, 14(3), 367–387. Available at: https://doi.org/10.1093/fpa/orw042.
20. Nones, N. (2025). European identity and the euro in Kosovo. *Nations and Nationalism*, advance online publication. Available at: https://doi.org/10.1111/nana.13136.
21. Otovescu, A. (2026). Population Migration. In Otovescu, D. and Otovescu, C. (eds.), *Contemporary Sociology: Fields of Study and Representative Concepts*, Vol. 2, 228–258. Craiova: Beladi.
22. Ramet, S. P. (2006). *The three Yugoslavias: State-building and legitimation, 1918–2005*. Bloomington, IN: Indiana University Press.
23. Smith, A. D. (1991). *National identity*. Reno, NV: University of Nevada Press.
24. Vickers, M. (1998). *Between Serb and Albanian: A history of Kosovo*. New York, NY: Columbia University Press.
25. Wimmer, A. (2013). *Ethnic boundary making: Institutions, power, networks*. Oxford: Oxford University Press.

# The Development of Social Protection in Post-Communist Romania

**Cosmin-Constantin SICREA**
Assistant Lecturer, PhD (Associate), University of Petroşani, Faculty of Economics, Administrative and Social Sciences, Romania
Email: cosmin_sicrea2005@yahoo.com

***Abstract:*** *The development of social protection in post-communist Romania reflects a transition from a traditional model to a mixed one, based on European principles of equity, subsidiarity, and public-private partnerships. Although notable progress has been made, the system still faces structural challenges, inequities, and the need for continuous modernization. This transition is emblematic of the profound transformations that have defined Romanian society after 1989. During the communist era, the state maintained an omnipresent role in the lives of its citizens, assuming total responsibility for individual welfare. Social protection was standardized, lacking both transparency and flexibility, and failed to effectively address the diverse needs of the population. In the communist period (1945–1989), social assistance entered a decline, being ideologically rejected on the grounds that a society providing full employment could not harbor vulnerable individuals; consequently, social protection institutions were either abolished or restructured. The evolution of social assistance in Romania after the fall of communism effectively led to a rebirth of the field through a complex process characterized by a dual reform: legislative and managerial. After 1989, the legacy of the communist regime and the new social realities of the transition—marked by rapidly increasing unemployment, poverty, and social polarization—rendered the reform of the system a matter of urgency.*

***Keywords:*** *social protection; legislation; social assistance; social vulnerability; post-communist Romania*

## 1. Social Welfare During the Communist Period

After nearly a century of development, professional social work in Romania experienced a period of flourishing until World War II. However, the Communist Party abolished the social work profession starting in 1968, and it was only reinstated following the fall of the Iron Curtain in 1989 (Lazăr, Mihai, Gaba, Ciocănel, Rentea and Munch, 2018).

Consequently, in Romania, during the communist regime led by Nicolae Ceauşescu, social work was virtually non-existent as an autonomous profession, having been replaced by a form of ideological and administrative control over the population. Following the establishment of the communist regime in 1947, Romania adopted the Soviet model of social organization. Traditional social assistance—whether charitable, religious, or private—was completely eliminated. Monasteries, churches, and philanthropic organizations that provided support were either dissolved or nationalized. the state became the sole provider of social services; however, these served a coercive and regulatory purpose rather than offering authentic support. Social aid was granted through political dictates rather than individual assessment, and the profession of social worker remained unrecognized.

The communist regime promoted the doctrine that the State held exclusive responsibility for citizen welfare, rendering individualized social assistance unnecessary or even detrimental, as it was perceived to undermine the role of the State. Thus, “social workers” were, in most cases, civil servants, medical staff, or educators lacking specialized training. Education in the field was non-existent; the only “training”

instruments were designed for technical or medical personnel, devoid of foundations in psychology, sociology, or professional ethics. Thousands of children and adults lived in inhumane conditions without genuine support.

The social assistance system was gradually dismantled through a series of reforms beginning in 1947, which replaced the previous framework with an extremely limited, fragmented system where unskilled public officials occasionally distributed benefits only in cases deemed "emergencies". Furthermore, the government prohibited undergraduate studies in social work starting in 1952, followed by the complete abolition of social work education in 1969. Until the 1960s, the only existing social service institutions were those designated for orphans, persons with disabilities, and the elderly. Typically, social protection programs were generically referred to as the "social state" (Sicrea, 2025: 125–126).

## 2. Disability: From Denial to Legally Regulated Forms of Social Protection in Romania

By the end of 2023, approximately one in 20 people in Romania held a disability certificate, totaling over 900,000 individuals, of whom more than 77,000 were children (World Bank, 2023). Beyond viewing disability merely as a medical condition, this issue must be examined within a holistic framework as a phenomenon with profound social resonance in contemporary society.

For instance, the Parsonsian model posits that, regardless of the nature of the affliction or the socio-economic factors involved, individuals will behave in a uniform manner. This model pays scant attention to subjective interpretations, articulating only the perspectives of societal representatives responsible for recovery—namely, the medical profession. Occupying the "sick role" is intended to be a temporary state. However, these same assumptions are applied to individuals with impairments. The "impairment role", for example, is assigned to an individual whose condition is unlikely to change and who is either unable or unwilling to fulfill the primary prerequisite of the sick role: to "get well" as quickly as possible (Barnes and Oliver, 1993).

In Romania's recent past, children with disabilities suffered fundamental human rights violations within state-run orphanages, including the violation of the right to life. Following the televised execution of dictator Nicolae Ceauşescu in December 1989, the public was exposed to the tragedies that had unfolded within numerous communist state healthcare facilities (Dinu, 2014: 4). Disability, hidden from the public eye, served to portray a society "free of social problems". Consequently, individuals with disabilities were frequently isolated from the rest of the population. In a report published by The Guardian, Florin Soare, an expert at the Institute for the Investigation of Communist Crimes, estimates that between 1966 and 1989, 15,000 to 20,000 child deaths occurred within Romania's network of orphanages, the vast majority in those reserved for children with disabilities (Walker, 2019).

The collapse of communism further revealed a grim reality within Romania's orphanages, nurseries, and pediatric wards: an epidemiological disaster in which thousands of children were infected with HIV during hospitalization. The HIV epidemic in Romania emerged and evolved primarily as a pediatric one (Pleşca, 1998: 12). Malpractice, the lack of disposable syringes, and political ignorance facilitated the rapid spread of HIV among children, leading to an unprecedented crisis. By the year 2000,

60% of European pediatric HIV-AIDS cases were registered in Romania (Dente and Hess, 2006).

The status of persons with disabilities in Romania acquired legal dimensions in the post-1989 era, starting with the establishment of the State Secretariat for the Handicapped. Over time, the specialized institution responsible for coordinating, guiding, and monitoring disability protection and social integration has undergone various structural changes. It evolved from an authority under the General Secretariat of the Government, the Ministry of Health and Family, or the Ministry of Labor, Social Solidarity, and Family (until 2010), to a specialized directorate within the Ministry of Labor, Family, Social Protection, and the Elderly (between 2010–2014). In December 2014, through Emergency Ordinance (OUG) no. 86, the National Authority for Persons with Disabilities (ANPD) was established as a specialized body of the central public administration with legal personality, assuming responsibility for disability protection (Moroianu-Zlătescu, 2015: 9–10). Furthermore, since 2006, Romania has implemented Law no. 448/2006, designed to protect and promote the rights of persons with disabilities. This legislation establishes the legal framework to guarantee equal access to opportunities and to foster the social inclusion of persons with disabilities (see Table 1).

**Table 1. The Main Provisions of Law No. 448/2006**

| | |
|---|---|
| **Definitions** | Disability |
| | Types of impairment/handicap |
| **Right to Education** | Accessibility / Infrastructure |
| | Adapted / Special Education |
| **Medical Services** | Free of charge / Subsidized |
| | Rehabilitation / Medical devices |
| **Accessibility** | Infrastructure / Urban mobility |
| **Social Benefits** | Allowances, financial support, free transport |
| **Socio-professional Integration** | Vocational training / Adapted workplace / Sheltered workshops |
| **Combating Discrimination** | Sanctioning all forms of discrimination against persons with disabilities, regardless of the nature of the disability/impairment |

*Source: Generated by the author*

### 3. The Transition to Contemporary Social Welfare

Following 1989, Romania initiated a comprehensive reform of its social protection system, driven by the pressures of economic transition and European integration. Unemployment benefits were introduced via the Unemployment Law of 1991, establishing an essential safety net for citizens and households while contributing to poverty mitigation.

A primary policy lever to consider is the duration of unemployment benefits, which appears to have a direct influence on the poverty rate among the unemployed (European Commission, n.d.: 7).

New forms of social assistance emerged: social aid (the Guaranteed Minimum Income, introduced in 2001), child allowances, and heating subsidies. As of January 1, 2024, Law no. 196/2016 on the Minimum Inclusion Income (VMI), with subsequent amendments, has been implemented. This legislation is a key component of the National Recovery and Resilience Plan (PNRR), Chapter 13, "Special Reforms" (Direcţia de Asistenţă Socială Piteşti, n.d.).

Alongside other vulnerable social categories, the protection of the elderly remains a priority for authorities.

The Romanian pension system continues to be a subject of intense debate and reform, framed by the country's economic and demographic challenges. Population aging and declining birth rates exert increasing pressure on the sustainability of the public pension system, elevating it to a critical concern. However, measures required to maintain long-term viability risk compromising the adequacy of the pensions provided. The public system faces potential unsustainability due to a shrinking active population and a rising number of retirees.

Periodic adjustments have been made to both the retirement age and the benefit calculation formula. For example, a motion submitted to the Romanian Senate in April 2025 noted that:

> *"The injustice faced by pensioners is exacerbated by an already impoverished population, with an average household disposable income at approximately 60% of the EU average, even though the economy would permit significantly more, given a GDP per capita at 80% of the European Union average." (Senate of Romania, 2025).*

Current challenges within the social protection system include population aging, regional socio-economic inequalities, and the social exclusion of vulnerable groups (children, the elderly, and persons with disabilities). To analyze the current state of the social protection system, the following vulnerable categories are highlighted using official estimates:

In response to these challenges, Law no. 219/2015 on the Social Economy, with subsequent amendments and additions, sought to regulate and promote the social economy by supporting the establishment and operation of social enterprises and work-integration social enterprises, with the broader objective of increasing the social and labour-market inclusion of people belonging to vulnerable groups (Otovescu, Calotă and Cioacă, 2019).

### 3.1. Children

According to the National Institute of Statistics (INS), the number of children (ages 0-17) residing in Romania was 3.796 million as of January 1, 2024—a decrease of 80,700 compared to the previous year (News.ro, 2024). Data from the National Agency for Payments and Social Inspection (ANPIS) indicates that in August 2025, 3,445,282 children received state allowances, totaling a budget of 1.159 billion RON, with an average monthly payment of 336.56 RON per child (ANPIS, 2025).

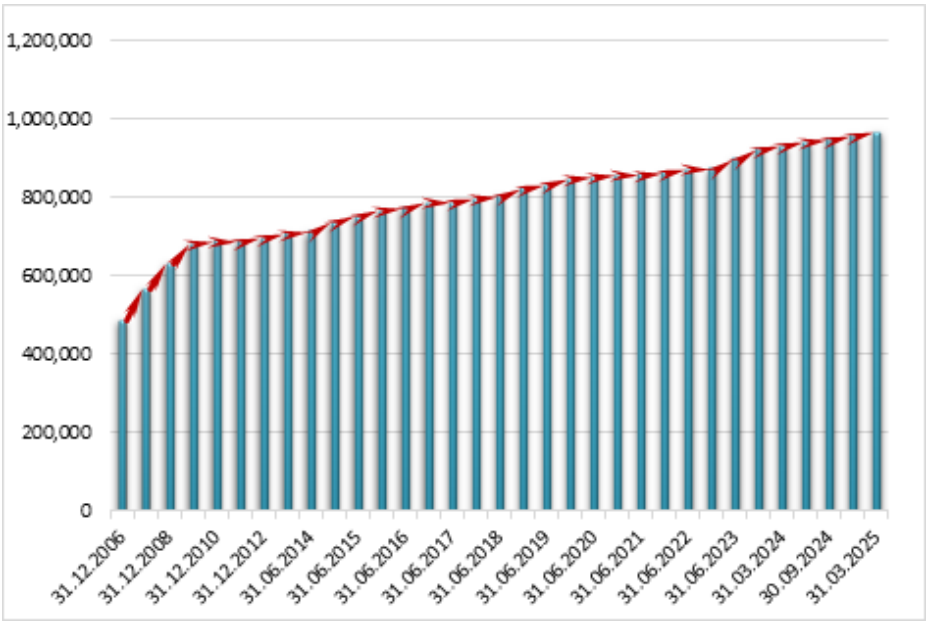
Regarding education, while the total number of students in the national system rose to 3,485,600 in the 2024-2025 academic year (INS, 2025a), a significant disparity

remains: 16% of Romanian children between the ages of 6 and 14 are not enrolled in school (Ofițeru, 2025).

### 3.2. Disability

According to the National Authority for the Protection of the Rights of Persons with Disabilities (ANPDPD), there are currently over 950,000 individuals officially registered with a disability degree in Romania (ANPDPD, 2025).

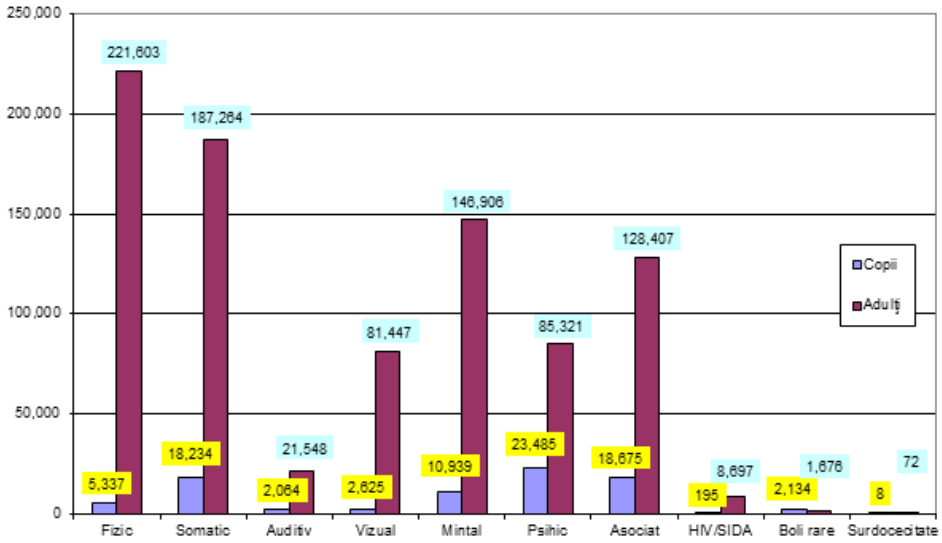
**Figure 1. Evolution of the Number of Persons with Disabilities, December 2006–March 2025**




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

According to Law no. 448/2006 on the protection and promotion of the rights of persons with disabilities, republished, the types of impairment are: physical, visual, auditory, deaf-blindness, somatic, mental, intellectual, HIV/AIDS, associated, and rare diseases. The number of persons with severe disabilities accounts for 43.59% of the total (compared to 43.11% as of December 31, 2024), those with accentuated disabilities represent 44.49% (compared to 45.61% as of December 31, 2024), and those with medium and mild disabilities account for 11.92% (compared to 11.27% as of December 31, 2023).

**Figure 2. Number of Persons with Disabilities by Type of Impairment as of March 31, 2025**




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

According to ANPDPD reports, the number of social assistance institutions for adult persons with disabilities as of March 31, 2025, is 787 (675 public and 112 private with contracted services), compared to 746 public as of December 31, 2024, among which: 708 are residential (606 public residential and 102 private residential with contracted services), compared to 572 public residential as of December 31, 2024, and 79 are non-residential – day centers (69 public non-residential and 10 private non-residential with contracted services), compared to 70 public non-residential as of December 31, 2024. The vast majority (93.27%) of the residential institutions for adult persons with disabilities are: care and assistance centers (34.60%), having 8,099 beneficiaries, protected housing (40.40%), having 1,892 beneficiaries, and habilitation and rehabilitation centers (18.79%) with 4,218 beneficiaries. These represent 87.69% of the total number of 16,203 persons in residential institutions.

A significant number of beneficiaries also exist in the 12 neuropsychiatric recovery and rehabilitation centers, specifically 1,452 persons (8.96%). Of the 708 residential social assistance institutions for adult persons with disabilities, 26 are centers with over 50 beneficiaries (2,506). These centers are in the process of restructuring (ANPDPD, 2025).

### 3.3. State Social Insurance Pensioners

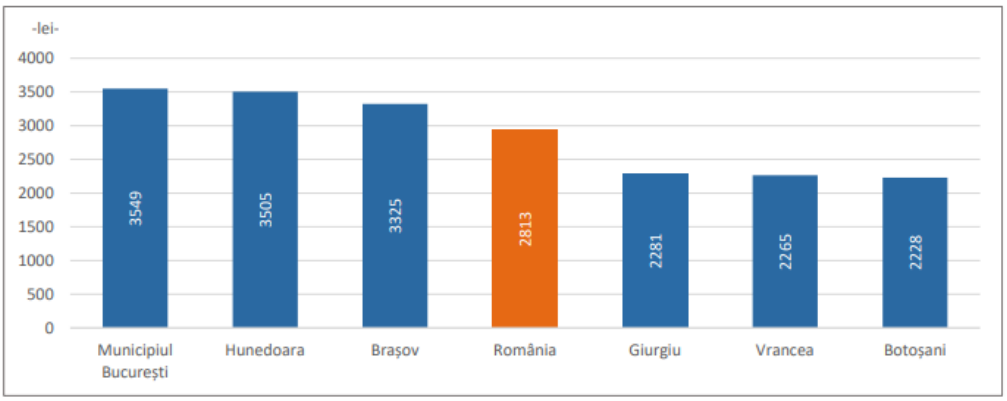
Regarding the category of state social insurance pensioners, they hold the majority share (92.8%) of the total number of social insurance pensioners. By pension categories, among the social insurance pensioners, the number of old-age pensioners is predominant (80.0%), followed by survivors' pension beneficiaries with a share of 9.5% and by pensioners with invalidity pensions, who represented 8.3%. In the category of social insurance pensioners, the smallest shares were held by pensioners

with partial early retirement pensions, with a share of 2.2%, and pensioners with early retirement pensions, whose share was 0.1%.

The ratio between the average number of state social insurance pensioners and that of employees was 8 to 10. This ratio presents significant variations in territorial profile, from 4 pensioners per 10 employees in the Municipality of Bucharest and in Ilfov County, to 14 pensioners per 10 employees in Teleorman County, and 13 pensioners per 10 employees in Vaslui County.

The average state social insurance pension varied with significant discrepancies in territorial profile, the gap between the minimum and maximum value being 1,321 lei (2,228 lei in Botoșani County, 2,265 lei in Vrancea County, and 2,281 lei in Giurgiu County compared to 3,549 lei in the Municipality of Bucharest, 3,505 lei in Hunedoara County, and 3,325 lei in Brașov County) (INS, 2025b) (see Figure 3).

**Figure 3. Maximum and Minimum Values of the Average Monthly State Social Insurance Pension by Territorial Profile in the Second Quarter of 2025**




*Source: National Institute of Statistics (https://insse.ro/cms/sites/default/files/com_presa/com_pdf/pensii_tr2r2025.pdf)*

The difference of 1,321 RON between the maximum value (Bucharest: 3,549 RON) and the minimum value (Botoșani: 2,228 RON) indicates that a pensioner in the capital has a disposable income approximately 60% higher than one in northern Moldavia. This discrepancy directly reflects the wage levels and historical contribution records within these respective regions. The development hubs of Bucharest and Brașov benefit from diversified economies and above-average wage levels, which correlate with higher pension entitlements. In the case of Hunedoara (3,505 RON), although it is not a commercial center of the same magnitude as the capital, the elevated pension value is explained by the region's industrial and mining history, where specialized working conditions generated superior pension points. The national average of 2,813 RON (highlighted in orange in Figure 3) serves as a critical demarcation threshold. It is observed that most counties at the lower end of the spectrum, such as Giurgiu, Vrancea, and Botoșani, fall significantly below this average, often being situated in predominantly agrarian regions where historical wage earnings were low.

As noted in the system analysis, these territorial variations are compounded by a concerning dependency ratio. In counties such as Teleorman or Vaslui, the ratio

exceeds 13–14 pensioners per 10 employees, rendering the disbursement of these pensions—even the lowest ones, such as those in Botoșani—extremely difficult to sustain solely through local resources, thus necessitating massive subsidies from the central budget.

Furthermore, while the 3,549 RON average in Bucharest appears considerably higher, reports indicate that the average disposable household income in Romania remains at approximately 60% of the European Union average. This underlines the fact that, despite recent increases, the average pension remains vulnerable to inflation and the actual cost of living.

## 4. Instead of a Conclusion

The post-communist transition of Romania's social assistance system constituted a laborious structural process, defined by a paradigmatic shift from the systemic denial of social pathologies to a model of professionalized intervention. This evolution was accelerated by the pressure exerted by the stringent realities brought to light in the post-December period, which necessitated an immediate reconfiguration of social protection mechanisms. The Romanian social protection system has evolved from an approach strictly based on institutionalization (large-scale asylums and orphanages) toward a diversification of services, aiming to address the specific needs of each age group.

The social assistance system in Romania faces a series of structural, financial, and administrative problems that affect the efficiency and equity with which social services are provided. In Romania, this system has the role of reducing inequalities and ensuring a decent living for vulnerable citizens: children, the elderly, persons with disabilities, etc. However, the Romanian social assistance system is marked by numerous malfunctions that limit its efficiency and its real impact on beneficiaries. One of the greatest problems of the system is chronic underfunding. The budget allocated annually to social assistance is often insufficient to cover the actual needs of the population. For this reason, many social services are poorly equipped, and the aid provided does not reflect the real cost of living. For example, child allowances or heating subsidies are far below the level necessary to effectively combat poverty. Furthermore, in the absence of investment, the system cannot evolve or adapt to new social realities.

The Romanian social assistance system, governed primarily by Law no. 448/2006, is designed to protect vulnerable groups, including approximately 950,000 registered persons with disabilities. However, while the system provides a structured framework for classifications—ranging from severe (43.59%) to mild (11.92%) disabilities—significant challenges remain regarding the adequacy of these benefits.

The current system faces chronic underfunding, which directly impacts the quality of life for beneficiaries. Social allowances, such as child benefits and heating subsidies, are reported to be far below the levels required to effectively combat poverty or reflect the actual cost of living. Without sustained investment, the system remains rigid, failing to adapt to new social realities or provide adequate rehabilitative infrastructure. Social benefits in Romania do not fully cover a decent standard of living. Even the highest average pensions remain vulnerable to inflation, and the national average disposable household income is only approximately 60% of the European Union average.

The social assistance system in Romania urgently needs reforms regarding funding, digitalization, the professionalization of staff, and, above all, an approach centered on the real needs of the beneficiaries. Only through constant investment and coherent public policies can we build a system that effectively supports vulnerable categories and contributes to a more equitable society based on solidarity.

Optimizing the system requires a transition from the administrative management of poverty toward a proactive management of social risks, based on digitalization, integrated community intervention, and the professionalization of human resources through supervision mechanisms and competitive salaries.

In conclusion, the analysis of the evolution of social work in Romania reveals a profound structural transition, marked by a shift from the paradigm of ideological denial of social pathologies, specific to the communist regime, toward a contemporary system grounded in professionalized intervention and the imperative of respecting human rights. This metamorphosis involved abandoning rudimentary philanthropic measures and the practice of coercive institutionalization in favor of a rigorous scientific discipline, consolidated through the academic training of specialists and a methodology centered on empowerment and deinstitutionalization. Although the current normative and educational framework is harmonized with European standards, the necessity for debureaucratization, the digitalization of processes, and the mitigation of disparities between urban and rural areas remain critical imperatives for the crystallization of a truly proactive and integrated social protection system.

**References:**

1. ANPDPD. (2025). *Statistici privind persoanele cu dizabilități, 31 martie 2025*. Available at: https://anpd.gov.ro/web/transparenta/statistici/
2. ANPIS. (2025). *Raport privind alocațiile pentru copii: August 2025*. Bucharest: Ministry of Labour, Family, Youth and Social Solidarity. Available at: https://www.mmanpis.ro/wp-content/uploads/2025/09/ALOC_202508.pdf
3. Barnes, C., and Oliver, M. (1993). *Disability: A Sociological Phenomenon Ignored by Sociologists*. Leeds: Centre for Disability Studies, University of Leeds.
4. Dente, K., and Hess, J. (2006). Pediatric AIDS in Romania: A country faces its epidemic and serves as a model of success. *MedGenMed*, 8(2), 11. PMID: 16926750; PMCID: PMC1785216.
5. Dinu, A. (2014). Rights of children with disabilities in post-communist Romania. *A Journal of Human Rights*, IV(1), 1–15.
6. Direcția de Asistență Socială Pitești. (n.d.). *Venitul minim de incluziune*. Available at: https://www.dasp.ro/venit-minim-de-incluziune/
7. European Commission. (n.d.). *Prestații de șomaj*. Available at: https://commission.europa.eu/document/download/343a2aa9-f0e9-4e81-a158-259b50adb58d_ro?filename=european-semester_thematic-factsheet_unemployment-benefits_ro.pdf
8. INS. (2025a). *Populația școlară a fost de 3.485,6 mii persoane în anul școlar/universitar 2024–2025*. Available at: https://insse.ro/cms/sites/default/files/com_presa/com_pdf/sistemul_educational_2025_r.pdf

9. INS. (2025b). *Pensii de asigurări sociale de stat în trimestrul II 2025*. Available at: https://insse.ro/cms/sites/default/files/com_presa/com_pdf/pensii_tr2r2025.pdf

10. Lazăr, F., Mihai, A., Gaba, D., Ciocănel, A., Rentea, G., and Munch, S. (2018). Romanian social workers facing the challenges of neo-liberalism. *European Journal of Social Work*, 22(2), 326–337. https://doi.org/10.1080/13691457.2018.1540405

11. Moroianu-Zlătescu. (2015). *Evoluția protecției și promovării drepturilor persoanelor cu dizabilități în România*. Bucharest: Institutul Român pentru Drepturile Omului.

12. News.ro. (2024). INS: La 1 ianuarie 2024, numărul copiilor cu vârsta de până în 17 ani care aveau domiciliul în România a fost de 3,796 milioane, în scădere cu 80.700. Available at: https://www.news.ro/social/ins-la-1-ianuarie-2024-numarul-copiilor-cu-varsta-de-pana-in-17-ani-care-aveau-domiciliul-in-romania-a-fost-de-3-796-milioane-in-scadere-cu-80-700-1922400031002024051521612699

13. Ofițeru. (2025). Starea educației din România: 16% dintre copiii români de 6–14 ani nu sunt înscriși la școală. La liceu, abandonul școlar crește la 32%. *Europa Liberă România*. Available at: https://romania.europalibera.org/a/raport-ocde-educatia-din-romania/33525758.html

14. Pleșca, D. (1998). *Infecția cu HIV la copil*. Bucharest: Editura Medicală Amaltea.

15. Otovescu, D., Calotă, G., and Cioacă, V. O. (2019). The Social Economy in Romania: Opportunities, Vulnerabilities and Alternative Solutions. *Revista Universitară de Sociologie*, XV(2), 20–40.

16. Senate of Romania. (2025). [Motion submitted in April 2025 concerning pensioners' incomes]. Bucharest: Senate of Romania.

17. Sicrea, C.-C. (2025). *Influența personalității familiale haotice asupra dezvoltării copilului aflat în risc de instituționalizare*. Craiova: Editura Sitech.

18. Walker. (2019). Thirty years on, will the guilty pay for horror of Ceaușescu orphanages? *The Guardian*. Available at: https://www.theguardian.com/world/2019/dec/15/romania-orphanage-child-abusers-may-face-justice-30-years-on

19. World Bank. (2023). *Disability Inclusive Social Protection in Romania*. Available at: https://www.worldbank.org/en/country/romania/brief/disability-inclusive-social-protection-in-romania

# The Impact of New Role Models (Influencers) Through Social Media on the Decline of Traditional Role Models (Parents) from the UVT Perspective Theory: A Field Study on Some Algerian Youth

**Adel CHIHEB**
University of Jijel (Algeria)
Email: chiheb-adel@univ-jijel.dz

**Abstract:** *In the era of liquid modernity and digital saturation, the mechanisms of socialization and value transmission are undergoing a shocked shift. This sociological study explores the structural and axiological displacement of traditional role models—specifically parents and familial authority figures—and the concurrent rise of social media influencers as primary agents of socialization among Algerian youth. Utilizing the Unconscious Value Transition (UVT) theoretical framework, this paper argues that the transmission of values has shifted from a conscious, vertical pedagogical model rooted in physical proximity to an unconscious, horizontal, and algorithmic model rooted in digital performativity.*

*Through a quantitative survey of 363 Algerian social media users, complemented by qualitative contextual analysis, this study provides robust empirical evidence of this shift. The results indicate that 91.7% of respondents perceive a fundamental alteration in upbringing patterns due to new media. Furthermore, a precise statistical inversion is observed: 68.3% of youth reject parents as their primary source of socialization, while the exact same percentage identifies new media as the dominant source. The study further elucidates the psychological mechanisms at play, confirming that cognitive dissonance (84.6% agreement) acts as a catalyst for value adjustment, driving youth to unconsciously align their belief systems with the "liquid" values of digital influencers to resolve the tension between their traditional upbringing and their digital reality.*

**Keywords:** *Unconscious Value Transition (UVT); Social Media Influencers; Parental Authority; Digital Socialization; Liquid Modernity; Cognitive Dissonance; Axiological Shift.*

## Introduction

The sociology of the family and the sociology of media have traditionally been treated as distinct, albeit overlapping, fields of inquiry. However, the rapid and pervasive proliferation of digital technology in the 21st century has forced a convergence of these disciplines. Historically, the transmission of cultural capital, moral values, and social norms was a vertical process, descending from parent to child, reinforced by educational and religious institutions (Bourdieu, 1986; Jæger & Breen, 2016, p. 1079). This phase of "solid modernity" ensured a degree of continuity in social reproduction, where the values of the previous generation served as the primary reference point for the next, whether through replication or rebellion.

Today, we observe a rupture in this continuity. The digital age has introduced a "third parent"—the algorithmically curated feed of social media—which introduces children and adolescents to a new class of role models: the influencer. Unlike traditional role models who are defined by physical proximity, temporal stability, and direct supervision, these new role models are fluid, performative, and often exist in a commercialized reality (Chiheb, 2024b; Archer & Robb, 2024, p. 129). This shift is not merely technological but deeply sociological, altering the very fabric of how human beings learn to be human.

The Algerian context serves as a vivid illustration of this global phenomenon. As a society navigating the tension between deep-rooted traditionalism—characterized by collectivism, religious conservatism, and strong family hierarchies—and rapid digital globalization, the friction between the "solid" values of the family and the "liquid" values of the influencer is particularly acute. Empirical evidence suggests that young people are increasingly engaging in behaviors and adopting values—ranging from liberal sexual attitudes to consumerist materialism—that are diametrically opposed to their familial upbringing (Chiheb, 2024b; Chami & Tlidjani, 2025).

The Unconscious Value Transition (UVT) Perspective theory offers a comprehensive framework for understanding how values are not merely rejected or accepted through rational discourse but are absorbed unconsciously through exposure, repetition, and emotional engagement in the digital sphere (Chiheb, 2024a). By analyzing a dataset of 363 Algerian youth, this study aims to quantify the extent of this displacement and interpret the sociological implications of a generation raised by algorithms rather than ancestors.

## 1- Theoretical Framework: The Unconscious Value Transition (UVT)

To understand the displacement of the parent by the influencer, we must first establish the theoretical mechanisms at play. The UVT theory posits that value acquisition in the digital age differs fundamentally from historical precedents, relying on the subconscious processing of information and the erosion of traditional socialization structures.

**1-1- The Shift from Direct to Alternative Socialization:** A core assumption of UVT is the transition from "Direct Human Socialization" to "Indirect Socialization through New Digital Media," also termed alternative socialization (Chiheb, 2024a). Traditional direct socialization involves face-to-face interaction, emotional regulation, and the physical presence of the role model (the parent). It is a process rich in emotional nuance and immediate feedback loops.

Indirect socialization is mediated by screens. It lacks human interactivity in the traditional sense but compensates with high-frequency stimuli, global reach, and algorithmic reinforcement. This shift creates a competitive environment where the parent must compete with the influencer for the child's cognitive bandwidth. As noted in empirical studies, the engagement with influencers is not passive; it drives "socialisation-driven agency," where children use influencer content to construct their identities, often independent of, or in opposition to, their parents' guidance (Almeida et al., 2025, p. 2).

**1-2- Liquid Role Models vs. Solid Authority:** UVT posits that traditional role models have become "flexible" or weak in the face of digital encroachment. The traditional model (parent, teacher) is characterized by "solidity"—stable values rooted in heritage. In contrast, the influencer represents the liquid role model (Bauman, 2000). They are transient, characterized by fleeting popularity and flexible values. When parents fail to provide rigid or clear value structures, adolescents turn to these "liquid role models" who offer clear, albeit transient, guidelines on how to look, act, and consume (Chiheb, 2024a).

**1-3- The Mechanism: Cognitive Dissonance and the Unconscious Mind:** The UVT framework identifies cognitive dissonance as the pivot for value change. When a child raised with traditional values encounters an influencer who promotes conflicting values (e.g., exhibitionism vs. modesty), they experience psychological discomfort. UVT posits that to reduce this discomfort, the individual unconsciously shifts toward the values presented in the new media because these values are reinforced by peer groups (Virtual Communities) and algorithmic validation. This process relies on implicit learning—the unconscious mind absorbs the behaviors of the influencer and integrates them into the self without the filter of critical awareness (Chiheb, 2024a; Festinger, 1962).

## 2- Methodology

### 2-1- Research Design

This study employs a descriptive-analytical approach, utilizing a quantitative survey to empirically test the assumptions of the UVT framework. The research design is structured to measure the prevalence of digital socialization and the extent of the authority shift from parents to influencers among Algerian youth.

### 2-2- Sample Characteristics

The data was collected via an online questionnaire distributed to Algerian social media users. The final dataset consists of 363 valid responses. The demographic profile of the sample is detailed in Table 1.

**Table 1: Socio-Demographic Characteristics (N = 363)**

| Variable | Category | Frequency | Percentage (%) |
|---|---|---|---|
| Gender | Male | 219 | 60.3 |
| | Female | 144 | 39.7 |
| Age Group | 18–25 | 156 | 43.0 |
| | 26–35 | 207 | 57.0 |
| Educational Level | Primary | 37 | 10.2 |
| | Secondary | 115 | 31.7 |
| | University | 207 | 57.0 |
| Geographical Origin | Rural | 156 | 43.0 |
| | Urban | 207 | 57.0 |
| **Total** | | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

The demographic characteristics of the sample, which consisted entirely of young people (100% under 35), a majority with university degrees (57.0%), and a substantial urban population (57.0%), are particularly pertinent to the UVT framework. The elevated educational levels imply that the observed departure from conventional values is not a result of a lack of knowledge, but rather an active intellectual and cultural realignment. These "digital natives" possess the cultural capital required to engage with global digital environments, making them more open to "New Role Models" that are not confined to the local Algerian setting.

Furthermore, the significant rural representation, comprising 43.0%, contradicts the presumption of geographical isolation in traditionalism, illustrating the penetration of the internet's "liquid" modernity into even conservative rural areas. Gender dynamics are also critical; the male majority, at 60.3%, mirrors wider social trends in Algeria, where males generally experience greater digital autonomy and less domestic surveillance than females, thus amplifying their exposure to alternative value systems.

## 3- Results

The analysis of the dataset reveals a profound structural transformation in the socialization of Algerian youth. The findings are categorized into four thematic areas: the rise of alternative socialization, the dominance of digital role models, the psychological mechanisms of transition, and the generational divide.

### 3-1- The Structural Shift: Alternative Socialization

The first set of data examines the perceived impact of new media on the fundamental process of upbringing.

**Table 2: Changes in Pattern of Parenting and Bringing Up Due to New Media**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 11 | 3.0 |
| Neutral | 19 | 5.2 |
| Agree | 333 | 91.7 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

The overwhelming consensus (91.7%) that new media has altered parenting patterns serves as the foundational validation for the UVT theory. In sociology, socialization is the process by which a biological organism is transformed into a social being. The fact that over 90% of respondents perceive a change indicates a rupture in the social reproduction mechanism. The "pattern" of upbringing is no longer linear (parent-to-child) but has become reticular (network-to-child). This confirms that the digital sphere is not merely a tool for entertainment but has become a structural component of the family institution, often destabilizing the parents' ability to control the socialization environment (Chiheb & Fennour, 2024).

### 3-2- The Inversion of Authority

To understand the extent of this shift, we compare the perceived role of parents versus new media as the primary source of socialization.

**Table 3: Using Parents as a Primary Source of Socio-Cultural Socialization**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 248 | 68.3 |
| Neutral | 78 | 21.5 |
| Agree | 37 | 10.2 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

**Table 4: Using New Media as a Primary Source of Socio-Cultural Socialization**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 37 | 10.2 |
| Neutral | 78 | 21.5 |
| **Agree** | **248** | **68.3** |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

The information presented in Tables 3 and 4 demonstrates a noteworthy, almost numerical reversal of influence, highlighting a significant shift in socialization patterns. A mere 10.2% of those surveyed cite parents as their principal socializing agents, whereas a substantial 68.3% directly challenge this idea, indicating a significant erosion of the traditional authority of the father or mother. This occurrence is conceptualized within the UVT model as the "Weakness of Traditional Role Models," wherein parents, frequently lacking digital proficiency, are progressively viewed as outdated in a context characterized by immediate, readily available information.

Conversely, a significant 68.3% of those surveyed identify new media as their principal means of social interaction, thereby highlighting the rise of algorithmic platforms as the primary shapers of values and self-perception. This transformation underscores the prevalence of Alternative Socialization: the screen has supplanted the home, and the values acquired are no longer those transmitted through familial guidance but rather those amplified by engagement algorithms, often prioritizing sensationalism, individualism, and consumerism over the communal and collective values inherent in traditional Algerian society. As a result, socialization has evolved from a "solid" form, grounded in lineage and familial bonds, to a "liquid" form, dictated by digital connectivity and algorithmic curation.

### 3-3- The Rise of the New Role Model (The Influencer)

The second dimension of the UVT framework posits that as parental authority wanes, digital influencers step into the vacuum as the new moral and behavioral guides.

**Table 5: Effect of Social Media Influencers on Socio-Cultural Beliefs**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 11 | 3.0 |
| Neutral | 44 | 12.1 |
| Agree | 307 | 84.6 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

**Table 6: Identification of Social Media Influencers as "New Role Models"**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 15 | 4.1 |
| Neutral | 48 | 13.2 |
| Agree | 300 | 82.6 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

The high agreement rates of 84.6% in Table 5 and 82.6% in Table 6 offer definitive evidence that the influencer has emerged as the new primary agent of acculturation among Algerian youth. This transformation is rooted in what scholars describe as "Parasocial Authority"—a form of influence distinct from parental authority, which relies on enforcement and discipline. Instead, influencers wield power through perceived authenticity and relatability (Archer & Robb, 2024), cultivating Parasocial Relationships (PSR) in which followers develop one-sided emotional bonds that feel intimate and personal. Within this dynamic, the transmission of values—particularly those central to the UVT framework—becomes remarkably efficient: when an influencer models a behavior, whether in fashion, language, or moral stance, followers adopt it not out of obligation, but from a desire for mimesis and social belonging. This process extends beyond surface-level trends to what can be termed "Axiological Impact"—a reshaping of the deep moral and cultural architecture of young people. In the Algerian context, this often manifests as a shift away from traditional values centered on modesty, privacy, and communal restraint toward influencer-promoted norms of exhibitionism, public self-presentation, and conspicuous consumption, thereby reconfiguring the very foundations of cultural identity and ethical orientation.

**Table 7: Comparison of Traditional vs. Digital Socialization Agents**

| Dominant Agent | Frequency | Percentage (%) |
|---|---|---|
| Family | 115 | 31.7 |
| Religious Institutions | 56 | 15.4 |
| New Media | 193 | 53.2 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

**Table 8: Dominance in Shaping Norms (Traditional vs. New Role Models)**

| Dominant Model | Frequency | Percentage (%) |
|---|---|---|
| Traditional Role Models | 15 | 4.1 |
| Neutral | 48 | 13.2 |
| New Role Models | 300 | 82.6 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

Tables 7 and 8 starkly illustrate the profound institutional crisis unfolding within Algerian society, particularly in the realm of value transmission and socialization. The family and religious institutions—historically regarded as the twin pillars of moral and cultural authority—are now jointly recognized as primary socializers by only 47.1% of respondents (Table 7), a figure notably eclipsed by New Media's 53.2%. Even more telling is the finding in Table 8, where a mere 4.1% of respondents attribute the shaping of social norms to Traditional Role Models, underscoring a near-total erosion of trust in these foundational institutions. The observed disintegration directly corresponds to the UVT framework's notion of the "Absence of Belief Spirit," a state wherein established institutions are no longer regarded as trustworthy or pertinent arbiters of truth, direction, or ethical principles. Consequently, Algerian youth are progressively relying on their smartphones, rather than the mosque or the familial setting, for guidance in contemporary existence. This shift engenders an axiological void: enduring, collectively held values are supplanted by the transient, algorithmically determined standards of the influencer economy, characterized by performative authenticity, morality contingent on trends, and a sense of belonging mediated through digital consumption.

### 3-4- The Mechanism of Transition: Virtual Communities and Cognitive Dissonance

How does this transition occur? The UVT posits that it is not a rational choice but a psychological adaptation to the conflict between lived reality and digital desire.

**Table 9: Influence of Virtual Communities on Shaping Beliefs**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 30 | 8.3 |
| Neutral | 74 | 20.4 |
| Agree | 259 | 71.3 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

**Table 10: Effect of Cognitive Dissonance on Value Adjustment**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 7 | 1.9 |
| Neutral | 48 | 13.2 |
| Agree | 307 | 84.6 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

**Table 11: Cognitive Dissonance Leading to Socio-Cultural Value Transition**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 11 | 3.0 |
| Neutral | 52 | 14.3 |
| Agree | 300 | 82.6 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

Table 9 indicates that a substantial 71.3% of participants view virtual communities as their principal reference groups, thereby indicating a significant transformation in the locus of youth belonging, shifting from biological families to online "tribes." These digital groups operate as potent echo chambers, reinforcing and legitimizing the values espoused by influencers while concurrently providing the social validation frequently absent in traditional family structures, particularly when families critique or misinterpret digital conduct. This reconfiguration of social allegiance is further exacerbated by the widespread psychological phenomenon of cognitive dissonance, as demonstrated by the notable 84.6% agreement in Tables 10 and 11. Algerian youth experience a considerable conflict between two incompatible realms: a physical, offline reality grounded in conservative social norms and a digital, online domain characterized by liberal, globalized modernity.

In accordance with Festinger's (1957) cognitive dissonance theory and the UVT framework (Chiheb, 2024b), this psychological unease drives individuals to reconcile the inconsistency. This reconciliation occurs not through alterations to their external

environments, which are significantly shaped by familial and societal influences, but through an internal adjustment of their value systems to correspond with the digital realm they aspire to. Table 11, which shows an 82.6% agreement rate, substantiates that this dissonance directly initiates a value shift: young people, without conscious awareness, internalize influencer-driven norms to mitigate the discomfort of navigating conflicting moral frameworks. Consequently, they begin to reinterpret traditional values as "outdated" and digital values as "progressive," thus resolving the conflict through a subtle yet definitive rejection of the former in favor of the latter.

### 3-5- The Generational Divide

The final data point quantifies the separation between the generations resulting from these processes.

**Table 12: Generational Differences in Socio-Cultural Values Due to New Media**

| Response | Frequency | Percentage (%) |
|---|---|---|
| Disagree | 15 | 4.1 |
| Neutral | 22 | 6.1 |
| Agree | 326 | 89.8 |
| **Total** | **363** | **100.0** |

*Source: Compiled by the author from the field survey (N = 363).*

With a substantial 89.8% consensus, the "Digital Divide" is understood not simply as a disparity in technological access or utilization, but as a significant Axiological Divide—a division that partitions parents and children into fundamentally disparate moral and cultural realms. This extends beyond variations in device preferences or online behaviors; it denotes a core fracture in the shared worldview previously presumed within the familial structure. Given that cultural reproduction depends on the effective intergenerational transfer of values, this data compellingly suggests that such transmission has demonstrably failed. The "language of interaction" (Chiheb & Fennour, 2024)—the array of symbols, references, and norms through which generations convey meaning—is now disrupted, thereby depriving parents and children of a shared frame of reference.

Therefore, even when family members are physically together, they live in separate realities: parents are tied to traditional values, while young people are immersed in a changing, digital world of morals. Qualitative case studies highlight the resulting emotional and psychological isolation within the home, where shared spaces like dining rooms and living rooms become places of silent separation. As a result, parental authority is not just questioned; it is seen as outdated, with parents viewed not as guides, but as remnants of a less relevant time, unable to understand, let alone shape, the values that guide their children's lives.

## 4- Discussion

This study set out to empirically test the core tenets of the Unconscious Value Transition (UVT) Perspective theory within the Algerian context. The quantitative data, obtained from 363 digital natives, provides compelling evidence that the digital sphere has not merely supplemented traditional socialization but has actively displaced it. This discussion interprets these findings through three sociologically distinct yet interconnected dimensions: the structural collapse of traditional authority, the psychological mechanism of dissonance-driven change, and the rise of the "liquid" influencer as the new architect of social norms.

### 4-1- The Structural Collapse: The Failure of Vertical Socialization

The most significant result of this study is the statistical reversal of socialization authority. Given that 68.3% of participants identified new media as their primary socialization source, mirroring the percentage that rejected parental influence (Tables 3 & 4), a shift away from cultural reproduction is evident (Bourdieu, 1986).

Traditionally, the Algerian family functioned under a "Vertical Socialization" model, wherein values were transmitted from the parent to the child, a process supported by religious and educational structures. This model depended on the parent's control over the information available. Nevertheless, the data supports the UVT concept of Alternative Socialization (Chiheb, 2024a). The parent, frequently possessing less digital literacy than the child, has diminished capacity to regulate the child's understanding of reality.

This situation creates a sociological phenomenon that can be called an "Authority Vacuum." As shown in the Jijel case studies (Chiheb & Fennour, 2024), parents are physically present but have less influence. They provide basic needs like food and shelter, but the algorithm has taken over the role of teaching values and beliefs. The family home, once a place of tradition, has become open to outside influences. The strong boundaries of the home can't stop the changing values of the digital world, leading to a home where people are physically together, but their thoughts are separate, each in their own digital space.

### 4-2- The Psychological Engine: Cognitive Dissonance and Unconscious Adaptation

The efficacy of this transition stems from its psychological underpinnings, as suggested by the UVT. The substantial consensus regarding Cognitive Dissonance (84.6%) and its influence on value transition (82.6%) indicates that Algerian youth experience significant psychological strain (refer to Tables 10 & 11).

Algerian society is characterized by collectivism, religious conservatism, and modesty (horma). Conversely, the digital realm fosters hyper-individualism, exhibitionism, and secular consumption. Consequently, when a young person dedicates considerable time to consuming influencer content daily (Merazga, 2024), the disparity between their actual experiences and their digital aspirations engenders considerable dissonance.

In accordance with Festinger's theory and the UVT framework, the human mind endeavors to mitigate this cognitive dissonance. Given the limited capacity of adolescents to alter their immediate physical surroundings, such as their familial or societal contexts, they subconsciously modify their internal value systems to correspond with the prevailing digital consensus. Consequently, they begin to perceive conventional values not as inherently "correct," but rather as "restrictive," while digital values are no longer seen as "alien," but instead as "contemporary." This process of adaptation occurs unconsciously, propelled by the need to alleviate dissonance, rather than through a critical assessment of the values themselves. This elucidates the swift and widespread nature of the transition; it functions as a psychological survival mechanism within the digital era.

### 4-3- The "Liquid" Role Model: Authenticity vs. Authority

The study indicates that influencers are now the "New Role Models" for 82.6% of young people (Table 6). This change represents the triumph of "Liquid Authority" over "Solid Authority," as Bauman described.

Traditional role models, such as parents, religious leaders, and educators, gain authority from their established status and physical distance. They embody fixed, unchanging truths. In contrast, influencers gain authority through their closeness and relatability. As Archer and Robb noted, influencers use "calibrated amateurism" to seem approachable; they film in their homes, use informal language, and share personal stories (Archer and Robb, 2024).

This dynamic cultivates a parasocial relationship, wherein the follower experiences a perceived closeness to the influencer. Within the framework of the UVT, this perceived intimacy serves as the mechanism of influence. Because young people regard the influencer as a "peer," they become less critical. Consequently, when an influencer endorses a behavior that diverges from local customs—such as public dancing or gender integration—it is internalized not as an act of defiance, but as a legitimate lifestyle choice. The influencer offers a model for identity that is adaptable, appealing, and affirmed by quantitative measures (likes/views), which the "solid" and frequently inflexible traditional role model cannot match.

### 4-4- The "Absence of Belief Spirit" and the Generational Axiological Divide

The perception of a generational divide (89.8%, Table 12) goes beyond the typical "generation gap." It represents an Axiological Rupture.

The UVT describes the "Absence of Belief Spirit" as a state where individuals lack deep, anchored convictions, making them malleable to external influence. The data suggests that the younger generation, socialized by algorithms, has developed a value system that is transient and trend-dependent. Values are no longer "held"; they are "consumed."

This creates a profound disconnect within the Algerian family. Parents operate on a logic of lineage and continuity, while children operate on a logic of connectivity and novelty. This divergence explains the isolation observed in the qualitative data—communication fails not just because of screens, but because the interlocutors no

longer share a common moral language. The parent appeals to duty and tradition; the child responds with individual rights and digital validation.

## Conclusion

This quantitative examination of 363 Algerian adolescents demonstrates a systematic shift in the influence of traditional socialization agents. The "Solid Role Models" of previous generations, including parents, educators, and religious figures, have been replaced by contemporary "Liquid Role Models," specifically digital influencers.

The process underlying this displacement is both psychological and structural in nature. Structurally, alternative socialization through new media has emerged as the predominant method of learning for 68.3% of the youth surveyed. Psychologically, cognitive dissonance prompts 82.6% of young people to modify their values, thereby reconciling the discord between their conventional surroundings and their digital ambitions.

This transformation carries significant consequences for Algerian society. It indicates a departure from collectivist, lineage-oriented identities toward an individualistic, consumption-driven identity, as exemplified by influencers. The "authority gap" observed in this research implies that unless traditional institutions adapt their communication strategies and re-establish connections with the digital realities of youth, the preservation of local cultural heritage is at considerable risk. The influencer, therefore, functions not only as a purveyor of entertainment but also as the contemporary architect of the Algerian social self.

## References

1. Almeida, J. O. de, Lugosi, P., & Quinton, S. (2025). Child viewers' engagement with social media influencers: Exercising socialisation-driven agency. *Journal of Business Research*, 200(115590), 1–14. https://doi.org/10.1016/j.jbusres.2025.115590

2. Archer, A., & Robb, C. M. (2024). Influencers as role models. *Celebrity Studies*, 15(2), 128–142. https://doi.org/10.1080/19392397.2024.2341594

3. Bauman, Z. (2000). *Liquid Modernity*. Cambridge: Polity Press.

4. Beuckels, E., & De Wolf, R. (2025). Social media influencers as new agents on parenthood? A systematic literature review of parent influencer research and a future research agenda. *Information, Communication & Society*, 28(4), 744–762. https://doi.org/10.1080/1369118X.2024.2334913

5. Bourdieu, P. (1986). The forms of capital. In J. G. Richardson (Ed.), *Handbook of Theory and Research for the Sociology of Education* (pp. 241–258). New York: Greenwood Press.

6. Chami, Z., & Tlidjani, N. (2025). The impact of social media on Algerian youth values – a case study on TikTok content creators in Algeria. *El Mieyar*, 29(2), 93–107. https://asjp.cerist.dz/en/article/265014

7. Chiheb, A. (2024). The impact of new media on Algerian youth: An exploratory study of attitudes toward its impact on the transition of sexual values and beliefs. *Revista*

*Universitară de Sociologie*, Issue 3/2024, 164–173. https://sociologiecraiova.ro/revista/wp-content/uploads/2024/12/FULL-VERSION-1.pdf#page=164

8. Chiheb, A. (2024a). The unconscious value transition: A new theoretical proposal. *Journal of Al Hikma for Media and Communication*, 12(1), 99–137. https://doi.org/10.13140/RG.2.2.25416.53767
9. Chiheb, A. (2024b). UVTT's meta-theoretical postulates – epistemological, ontological, praxiological, axiological, and methodological considerations. *Journal of Al Hikma for Media and Communication*, 12(1), 64–90. https://doi.org/10.13140/RG.2.2.34057.04968
10. Chiheb, A., & Fennour, N. (2024). Exploring the impact of social media on the Algerian family system: A case study in Jijel City. *The Journal of El-Ryssala for Media Studies*, 8(1), 34–47. https://doi.org/10.13140/RG.2.2.31835.78885
11. De Graaf, N. D., De Graaf, P. M., & Kraaykamp, G. (2000). Parental cultural capital and educational attainment in the Netherlands: A refinement of the cultural capital perspective. *Sociology of Education*, 73(2), 92–111. https://doi.org/10.2307/2673239
12. Deslandes, R., & Bertrand, R. (2005). Motivation of parent involvement in secondary-level schooling. *The Journal of Educational Research*, 98(3), 164–175. https://doi.org/10.3200/JOER.98.3.164-175
13. Festinger, L. (1962). *A Theory of Cognitive Dissonance*. Stanford: Stanford University Press.
14. Jæger, M. M., & Breen, R. (2016). A dynamic model of cultural reproduction. *American Journal of Sociology*, 121(4), 1079–1115. https://www.journals.uchicago.edu/doi/abs/10.1086/684012
15. Merazga, S. (2024). Attitudes of Algerian students towards TikTok influencer videos. *International Journal of Social Communication*, 11(3), 235–254. https://revue.univ-mosta.dz/index.php/ijsc/article/view/487
16. Pitafi, Z. R., & Awan, T. M. (2024). The rise of influencer culture: Marketing, monetization, and authenticity in the social sphere. In *Social Media and Modern Society – How Social Media Are Changing the Way We Interact with the World Around*. IntechOpen. https://doi.org/10.5772/intechopen.1006565
17. Ramdane, E., Mihoubi, R., & Yousfi, D. (2024). Algerian influencers and phenomena of cyberbullying: An analytical study of two YouTube vlogs. *Ziglôbitha, Revue des Arts, Linguistique, Littérature & Civilisations*, 10(1), 277–290. https://www.ziglobitha.org/wp-content/uploads/2024/05/19-Art.-RAMDANE-Elkhamssa-pp.277-290.pdf