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FACULTY OF SOCIAL SCIENCES  
POLITICAL SCIENCES SPECIALIZATION

Revista de Științe Politice.  
Revue des Sciences Politiques  
No. 85 • 2025



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**Revue des Sciences Politiques**

**No. 85 • 2025**



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## ORIGINAL PAPER

# Some considerations on the basic principles of the European Integration Process

Riana Maria Ciobanu<sup>1)</sup>, Ștefan-Codruț Florian Ciobanu<sup>2)</sup>

### Abstract:

This paper analyzes the basic principles of the European integration process, with a particular focus on the policy of economic, social and territorial cohesion, considered as the foundation of European solidarity. The main aim of the study is to explore the role of cohesion policy in the integration of the Member States of the European Union, highlighting its evolution and its impact on reducing economic and social disparities between regions and states. The objectives of the paper include analyzing the main stages of the implementation of this policy, identifying the challenges encountered, the reform strategies adopted and assessing the main results achieved.

The methodology of the study is based on the analysis of EU treaties, strategic documents and official reports on cohesion policy, complemented by the work of national and international researchers.

The results suggest that cohesion policy has been instrumental in supporting less developed regions and reducing economic and social disparities in the European Union. At the same time, the challenges related to the homogeneity and heterogeneity of the European Union, in particular in the regulatory and institutional dimensions, have influenced the effectiveness of the implementation of this policy.

**Keywords:** *cohesion policy, European solidarity, European integration, economic cohesion, regional disparities.*

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### **Introduction**

The European Union's cohesion policy, declared a strategic policy from the very beginning of the integration process, is a crucial instrument not only economically and socially, but also politically, as it is used to support the integration of Member States into the EU. The desire for economic and territorial cohesion, promoted since the creation of the European Communities in the 1950s, has become an important horizontal sectoral policy, and has been given increasing importance with each new Treaty and strategic programming documents adopted at European level. Economic, social and territorial cohesion has become a fundamental prerequisite for European solidarity, with the main objective being to reduce economic and social disparities between regions and between Member States so that all European citizens have access to equal opportunities and a comparable quality of life throughout the Union.

Cohesion policy is the best illustration of the principle of European solidarity, with most of the funds in the budget going to the EU's less developed countries and regions

### **Economic, social and territorial cohesion - key prerequisite for European solidarity**

Economic, social and territorial cohesion has from the outset been a strategic goal of the whole process of European integration and has been placed at the heart of almost all European policies and funding programs. This strategic goal has been based on the need for European decision-makers to reduce economic and social disparities between regions and Member States, so that all European citizens can benefit equally from opportunities and the quality of life is comparable across the Union. One of the most sustainable ways of operationalizing the principle of solidarity at European level is reflected in the EU's efforts to promote economic, social and territorial cohesion.

Bringing together countries with quite different histories, economic performance, social and cultural characteristics under the same common features has been the greatest challenge for national and EU decision-makers in the various subperiods after World War II. However, the regional consortium has survived the test of time and has successfully addressed the complex challenges that have threatened its stability, ranging from economic, financial and or related crises with the challenges of migration flows, to separatist movements and, recently, to health pandemics (Holobiuc, Miron, 2022, p.1). Throughout the process of European economic integration, the concept of cohesion has evolved substantially, gradually adding its economic, social and territorial dimensions. There is no explicit reference to regional policy in the Treaty of Rome, preferring formulations that committed to strengthening the unity of Member States' economies and reducing development disparities between regions. The initial concerns of the decision-makers in the countries participating in the integration experiment focused on securing the foundations for deeper integration by establishing, first a customs union and then a single market, free movement of goods, services, capital and labor, all of which were essential conditions for the future economic union.

An early reference point for the development of the concept of economic cohesion was the adoption in 1987 of the Single European Act, which expressly referred to the desire to achieve a higher level of convergence between the economies of the Member States. The issue of economic cohesion was further structured in regulatory terms in the Maastricht Treaty, which contains an entire chapter on cohesion.

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These documents formally introduced economic and social cohesion, highlighting the importance of gradually reducing the development asymmetries between regions and contributing to the awareness of the need for a balanced development of the entire EU area.

The Treaty of Lisbon, adopted in 2007 and in force since 2009, reinforced this development, emphasizing the need to promote economic, social and territorial cohesion and highlighting the important role of regional development policy and the Structural and Cohesion Funds. These funds are an essential instrument in the efforts to reduce economic and social disparities between regions and to promote sustainable and balanced development within the European Union. In this context, regional policy has become a key element of the EU strategy, the central objective of which is to reduce existing asymmetries in development while promoting a new cohesion scheme between regions. As is clear from the literature review (Miron, Holobiuc, 2020, p.96), achieving an adequate level of economic, social and territorial convergence has been consolidated as a strategic objective for decision-makers, both in the Member States and at EU level.

Economic, social and territorial cohesion policy as a whole comprises a kaleidoscope of actions that all interest groups in the European Union need to undertake in order to achieve harmonious and balanced economic development. Cohesion policy has established itself as the European Union's most complex and important horizontal policy, a fact which is also reflected in its main objective of reducing economic and social disparities between the regions of the Community. Sustainable development and equal opportunities are other objectives promoted by cohesion policy, which, together with the reduction of disparities, can help to reduce income disparities and increase the benefits for the EU economy as a whole, by acting in areas such as transport, the SME sector, urban development, vocational training, environmental protection and, last but not least, education.

Cohesion policy, as enshrined in its strategic axes, must be addressed to all regions and cities in the EU area and be implemented in close complementarity with other EU sectoral policies, because it can have a particularly strong impact in many areas of activity, such as education, employment, energy, environment, single markets, research and innovation. Several studies have shown that cohesion policy resources generate a net economic advantage in all these areas.

In the literature (Pîrvu et al., 2011, p. 146), cohesion policy is presented as a "reference to a policy framework designed to contribute to increased solidarity at European level" and participating in "the development of hundreds of projects supported across Europe by two structural funds, the European Regional Development Fund (ERDF) and the European Social Fund (ESF), as well as the Cohesion Fund". These funds, together with the European Agricultural Fund for Rural Development (EAFRD) and the European Maritime and Fisheries Fund (EMFF), make up the European Structural and Investment Funds. The analysis of these integrative realities shows that there is a close link between regional policy and cohesion policy, with the support of the Structural Funds providing them with the financial support for their implementation (Dornean, 2016, p. 56-74). Under these circumstances, as some specialists emphasize (Drăgan G., 2003, p. 8), cohesion policy is composed of regional policy (with the main aims of reducing territorial disparities by regenerating declining industrial areas and providing assistance for rural development), some components of social policy, but also part of the common agricultural policy (aimed at providing assistance for rural development).

The strategic objective of cohesion policy is what is now called 'convergence'. To this end, NUTS2 regions receive support, with eligibility and assessment criteria defined mainly on the basis of GDP per capita and unemployment rates.

The implementation of cohesion policy is based on a very rigorous strategic planning process and the definition of a concrete programming and partnership framework. As it is a policy to which a large volume of Community budget resources is allocated and to which multiple, often conflicting, interests are actively positioned, a broad system of interlinkages at all levels of Community decision-making has gradually been created to operationalize it.

The responsibility of European decision-makers for macroeconomic stability and the well-being of citizens is one that must also be shared with the Member States. The only European forum that does not subscribe to the logic of the democratic deficit that the entity suffers from, the European Parliament also emphasizes that the European Union works for social equality, develops social security and seeks to prevent social exclusion and discrimination (European Parliament, 2017). The analysis of the activities carried out by the grouping's governance bodies shows that they are all working in aggregate to ensure that the core values of Europeanism are reflected in European and national legislation and are not ignored. As has been amply demonstrated so far, this horizontal policy promotes economic, social and territorial cohesion in the EU (Article 174 of the Treaty on the Functioning of the European Union). Both the Member States and the EU are obliged to design and implement their economic policies in a way that is conducive to achieving the objectives of cohesion policy.

#### **Analysis of the main steps in the implementation of cohesion policy: components, challenges, reform strategies, main results achieved**

All regions and localities in the European Union (EU) should benefit from the advantages of implementing cohesion policy, not least because it aims to promote the competitiveness of enterprises, support the creation of new jobs, sustainable economic growth and improve the quality of life of citizens. Throughout the process of European integration, this policy has changed considerably, with several reforms, the most important of which were carried out in 1988 and 2006, during which the budget was transferred to the Member States, procedures were simplified, the number of beneficiaries increased and *ex ante* and *ex post* conditionality was introduced in the process of allocating resources. In addition, cohesion policy is now interlinked with the most important other EU sectoral policies and supports a multitude of actions and objectives set out in broad strategic documents. This policy is relevant not only from an economic and social perspective, but also from a political angle, as it has been used as a means to broaden support for the integration of countries into the EU.

The first reference to the desire for economic cohesion can be found in the preamble of the *Treaty of Rome* (1957), the leaders of the founding Member States sending a message that one of the basic objectives of the European Economic Community was "*to strengthen regional unity and ensure harmonious development*" (Holobiuc, Miron, 2022, p.3).

The Treaty of Rome did not lay the foundations for a truly comprehensive and structured cohesion policy. Although the treaty allowed the operationalization of three key instruments, their purpose was limited to tackling regional imbalances without creating a coherent cohesion policy. The first instrument was the European Investment Bank (EIB), which provided loans and guarantees to finance development projects in poor and

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restructuring regions. The second instrument was the European Social Fund (ESF), set up to help manage the social effects of the customs union, with the aim of improving labor market mobility through education and retraining in regions in industrial decline. The third instrument, the "Guidance" section of the European Agricultural Guidance and Guarantee Fund (EAGGF), supported underdeveloped rural areas through measures to modernize agriculture and rural development.

In the 1970s, cohesion policy became a priority on the agenda of the European Community, in particular because of the oil crisis and the impact of the accession of Denmark, the United Kingdom and Ireland in 1973, which increased regional disparities. Thus, in 1973, the European Commission began to set up the European Regional Development Fund (ERDF), the aim of which was to promote industry and infrastructure in disadvantaged regions. The Fund was formally established in 1975, but initially did not have a significant impact because of the national quota approach, which limited the allocation of funds to the poorest regions.

The 1988 reform was a crucial moment, given the expansion of the Community through the integration of Spain and Portugal in 1986. It contributed to a considerable increase in resources for less developed regions, doubling Structural Funds commitments by 1993 to 30.7% of the total EU budget. The reform introduced four key principles: concentrating assistance on the most disadvantaged regions, supporting multi-annual programs, complementing European funds with national contributions and involving national and sub-national authorities in project implementation. Community Initiatives have also been created, addressing issues such as the economic conversion of mining areas, environmental protection and stimulating technological innovation, reflecting a more integrated cohesion policy with a political component.

In 1993, the Maastricht Treaty strengthened cohesion policy, emphasizing its central role in reducing economic and social disparities between European regions. The treaty introduced the Cohesion Fund for countries with a per capita gross national income below 90% of the EU average. This measure was essential to support countries facing major economic difficulties and at risk of remaining excluded from the process of monetary integration.

The 2007 reform was a milestone in the context of the enlargement of the European Union and the structural changes brought about by the Lisbon Treaty. It brought together two camps of Member States: those supporting increased spending on cohesion policy and those opposing a significant increase in their financial contributions. The reform also underlined the importance of cohesion policy as an essential instrument for the harmonious development of the EU, stipulating in Article 174 TFEU that it should support the promotion of balanced regional development and the effective integration of new members.

The 2008 economic crisis had a devastating impact on many European economies, particularly in southern Europe. Austerity measures were often at odds with the need for European solidarity, and cohesion policy was used to mobilize additional resources and support struggling economies. The European Commission has adopted measures to increase flexibility, support regions in crisis by increasing cash flow and simplify state aid rules, targeting smart investments through cohesion policy. These measures have been essential to support the regions hardest hit by the recession and to strengthen struggling economies.

In March 2010, the European Council adopted Europe 2020, a document setting out a ten-year strategy to promote employment and growth in the EU. This strategy set

five headline targets for the EU up to 2020: employment, research and development, climate and energy, education and social inclusion, and poverty reduction. Member states' reactions have varied. Some countries, less affected by the economic crisis, supported cuts in cohesion policy spending, while others were critical of this approach. Thus the European Structural and Investment Funds (ESIF) were introduced, including the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development and the European Maritime and Fisheries Fund. These funds have been targeted on 11 objectives linked to the Europe 2020 priorities.

- Focus on strategic investment priorities such as innovation, supporting small businesses, digital technologies and the transition to a low-carbon economy.
- A tailored approach to regional development, with investment in all EU regions and their classification into less developed, transition and developed regions in order to distribute funds fairly.
- Simplifying the rules and making the framework more flexible to implement cohesion policy more effectively.

It can be noted that, at EU level, the need for coordination, standardization and simplification of cohesion policy is a frequently discussed topic, and new ways of making this policy more efficient are constantly being sought.

#### **Homogeneity and heterogeneity at EU level. Regulatory, institutional, operational dimensions**

We can appreciate that one of the most relevant definitions of the term region is the one given by the Council of Europe, which perceives it as "a geographically determinable interval of average size which is considered homogeneous" (Iftimoaie, et. al 2003, p. 55).

For Klaus Roth, the concept of "region" is characterized by both homogeneity and heterogeneity, and a number of specific criteria are used to define it as completely as possible (Roth, 2007, p. 21). Some of the authors (Băhnăreanu, Sarcinschi, 2012, pp. 9-10) have structured these criteria into two categories that they consider relevant - the objective (including factors, elements and functions among which the type of political unit, natural morphology, history, economy, infrastructure, religion, language, ethnicity, etc.) and the subjective (among which those related to aspects of everyday life and social interactions).

In order to achieve the goal of high homogeneity, it has become imperative that the existing disparities between the component regions in Europe be reduced as much as possible. To this end, the less developed regions must be supported to progress faster so that the process of homogenization becomes possible. Because regions are the result of the social, economic and cultural diversity existing in society, the European integrative architecture cannot function effectively if it does not give due importance to the proper management of diversity at both strategic and operational levels. At European Union level there are elements that unite the citizens of the grouping, but there are also elements that differentiate between them. Thus, we believe that the main aspects that unite Europeans are: the determination to participate in the integration of the single market, an increasing degree of homogeneity of economies, symmetry in strategic goals and a single international institutional framework which, through variable geometry and multi-level governance, brings together national and Community decision-making structures. There are also elements that differentiate Europeans, and these are of various kinds (political, economic, social, social, cultural, behavioral, etc.).

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From a linguistic point of view, the EU is characterized by great diversity, multilingualism being not only an everyday reality but also a policy actively promoted by the European Union, which supports the translation of all regulations and documents adopted in all Member States' languages in order to facilitate communication between its citizens. However, this diversity can create barriers and at the same time reflect deep-rooted cultural differences. Looking at the religious dimension, EU citizens adhere to a wide range of faiths, with Christianity (Catholic, Protestant and Orthodox) predominating, but also Islam and Judaism. Religious tolerance and acceptance of religious diversity are deep-rooted principles, but the diversity of religious traditions continues to shape cultural practices and even national policies in various ways. Common European values, such as respect for human rights, the promotion of democracy and the rule of law, transparency and freedom of thought and action, while consistently promoted, must continue to be pursued with a strong concern that the motto 'united in diversity' is successfully lived out, so that each country or region can preserve its own traditions, manifested in arts, festivals and customs, which may differ significantly from one area to another. This cultural diversity is also reflected and celebrated through intercultural events of major international resonance, such as the European Capital of Culture at certain intervals.

European cohesion policy is defined as a set of regulations, institutions, actions or concrete measures at both national and supranational level to encourage transnational cooperation and policies. However, the ideological and structural differences between member countries' systems of government - from republics to monarchies - reflect the diversity in policy and legislative approaches. Finally, there are also areas of economic diversity, where important steps have been taken over the decades of integration, structured in the form of the ambitious projects to achieve a single market or economic and monetary union, which has had as its corollary the completion of the euro area. Despite this integration effort, economic disparities between European countries remain evident, with some countries having highly developed economies while others still face significant economic challenges.

We appreciate that, despite substantial efforts to transfer as many powers as possible from national governments to common supranational bodies, some elements of differentiation are maintained and, in some cases even accentuated, fuelled by cultural heritages, religious backgrounds, linguistic differences and economic disparities that shape the diverse landscape of the continent. This duality between unity and diversity is undoubtedly a source of challenges, but it is also a valuable driver for innovation and cultural progress in Europe. Cohesion policy has to be shaped and implemented taking into account the very different local contexts and the very heterogeneous regional economic and social developments. Even though cohesion policy has an almost unified regulatory framework, the different national and regional circumstances need to be carefully taken into account in its operationalization. To this end, institutional arrangements need to be carefully designed and joint programmes need to include measures and instruments that allow for sensitive harmonization of national, regional and local plans.

Cohesion policy at EU level has gradually become a fundamental pillar of European integration, supported by several basic anchors: regulatory, institutional and operational. Success in this plan depends fundamentally on the correct identification and understanding of the challenges facing the grouping. This requires the constant adjustment of the institutional landscape of the European Union, the gradualization of the responsibilities of the various societal actors, the congruent consideration of the deepening and widening

processes of integration, the international role of the EU as a global actor, and the adaptation of European institutions to the growing range of challenges and crises.

The process of European integration has evolved on several levels, the most important of which remain economic (the European Union as a market) and institutional (the European Union as a state actor). Institutional integration (sometimes also called political integration or positive integration) focuses on the allocation of some of the political powers to the supranational level in order to reduce the inefficiencies of transnational markets. The highest stage of institutional integration is the formation of a political union, in which all the basic attributes of national sovereignty are transferred to the supranational level (Gilbert, 2003). The process of economic integration at the European level has taken place within a regulatory and institutional framework that has been continuously supplemented over time. The regulatory dimension, made up of a complex regulatory framework, has a significant impact on the way cohesion policies are managed and implemented within the EU. For example, the Regulation on the operation of the European Regional Economic Development Fund (ERDF) sets precise criteria for the allocation and use of common financial resources in regions with specific needs, thus contributing to reducing economic and social disparities. By reinforcing and improving the regulatory dimension of cohesion policy, the European Union demonstrates its commitment to promoting economic and social cohesion, facilitating the harmonious and balanced integration of Member States into the aggregate economic machinery. Cohesion regulations and legislation are thus a fundamental pillar in building a united, cohesive and prosperous Europe. With regard to the institutional dimension of cohesion policy, the European institutions (the European Commission, the European Parliament and the Council of the European Union) are fundamental in the process of formulating, implementing and monitoring the specific actions of this horizontal policy.

### **Conclusions**

In conclusion, the research highlights the fundamental principles of the European integration process, emphasizing the importance of economic, social and territorial cohesion as an essential pillar of European solidarity. Cohesion policy is a key instrument in reducing disparities between regions of the European Union and promoting balanced and inclusive economic development. Economic and social cohesion has been, and remains, a vital prerequisite for ensuring the successful integration of the new Member States, but also for supporting the less developed regions of the Union.

As the process of integration has evolved, new challenges have arisen related to the homogeneity and heterogeneity of the European Union, both at institutional and operational level. These structural differences between Member States and regions of the Union have required the adoption of reform strategies and continuous adjustments of cohesion policy to respond to economic and social diversity. The analysis of the stages in the implementation of this policy has also highlighted its key components and the importance of constant adjustment to new economic and political realities.

Thus, a unified approach to economic and social cohesion has been shown to be essential for reducing asymmetries and strengthening solidarity within the European Union. At the same time, cohesion policies need to be constantly rethought to respond to new global and internal challenges. The effective implementation of these policies will not only improve economic conditions, but will also promote a stable and prosperous climate in which all regions and EU Member States can benefit from equal opportunities.



## Some considerations on the basic principles of the European Integration Process

Against this background, the overall conclusion is that European integration cannot be complete without effective cohesion, which reduces disparities and ensures balanced, sustainable and inclusive development across the Union. Thus, the fundamental principles of the European integration process continue to evolve and the successful implementation of cohesion policy remains essential for strengthening the unity and stability of the European Union in the long term.

### Authors' Contributions:

The authors contributed equally to this work.

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## ORIGINAL PAPER

# The contractual liability of the goods carrier under the regulations of the Romanian Civil Code

Cristina Stanciu<sup>1)</sup>

### Abstract:

Failure to fulfil the obligations assumed in the transport contract gives rise to civil liability for both the carrier and the sender. Regarding the liability of the sender and the recipient, the applicable rules are those of common law. However, for the carrier, two types of liability must be analyzed: contractual liability and tort liability.

The current legal regime governing contractual liability is established by Article 1350 of the Civil Code. The essential condition for engaging the carrier's contractual liability is the existence of a transport contract. The general conditions for the carrier's contractual liability include: an unlawful act causing damage, the fault of the author, the existence of the damage, and the existence of a causal link between the damage and the unlawful act. Legal doctrine considers the carrier's liability regime to be stricter than the general contractual liability under common law. This is due to the commitment assumed by the carrier, namely, the obligation to deliver the transported goods to the recipient. Consequently, this obligation is considered a result obligation, meaning that any failure in execution may be equated with an unlawful act.

Thus, the carrier's unlawful acts constitute the legal basis for engaging liability. According to Article 1984 of the Romanian Civil Code, the carrier is liable for damage caused by: the total or partial loss of goods; the alteration or deterioration of goods occurring during transport; the delay in delivering the goods. These three unlawful acts, explicitly listed in the legal text, may lead to the engagement of the carrier's contractual liability. The provisions of Article 1984 of the Civil Code state that total or partial loss of goods, as well as their alteration or deterioration, according to express legal regulations, must occur during transport for the carrier's contractual liability to be engaged.

**Keywords:** *contractual liability, transport contract, loss, damage.*

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**The contractual liability of the professional.** Contractual liability, in general, has been the subject of numerous analyses in legal doctrine, and the coordinates and principles governing it have been established according to current civil regulations, whether analyzed from a traditional or modern perspective. Most authors, however, opine that—although the legal norm applies to both private individuals and professionals—the contractual liability of the professional should be assessed differently from that of a private individual, with greater severity. In the future, it may even be considered as a second form of general liability, alongside tortious liability (Pop, Popa, Vidu, 2012: 246).

The liability of the professional is dual in nature: tortious liability, when the professional violates professional obligations established by law, and contractual liability, when they enter into a contract with a client that defines the framework for exercising the attributes of their specific activity. Furthermore, the professional's liability is tortious when third parties unrelated to the contract suffer damages as a result of the professional activity.

The rationale behind the distinct assessment of the professional's liability lies in the fact that their activity must be carried out in accordance with the specific legal framework applicable to each type of professional, with maximum diligence and based on rigorous training. The professional must have the ability to anticipate potential harm or damages to the individuals benefiting from their services. The expertise they possess in their field differentiates them from private individuals and requires an impeccable professional conduct. This, in turn, gives new dimensions to their contractual obligations, which, in this context, must be assessed more critically and with greater severity compared to those of a private individual. Moreover, in most cases, the legal framework governing each professional's obligations toward the beneficiary of their services is established through deontological norms regarding the practice of their profession. These obligations, which form the legal framework of their activity, are incorporated into the contracts they conclude in the exercise of their profession, becoming commitments they undertake towards their clients. In other words, the obligations arising from the legal framework of their professional activity become contractual obligations.

The contract, seen as an expression of the parties' interests (Piperea, 2019: 8-13), is performed with a view to achieving the utility sought by each party. For private individuals, this utility is incidental, as they enter into contracts occasionally. However, for professionals, the continuity, volume, and promptness in concluding contracts are of paramount importance. To ensure contractual balance, contracts between professionals and private individuals must comply with consumer protection legislation, commercial practices, and the specific legal framework of the professional's field of activity.

Legal doctrine (Luntrarau, 2017: 151-160) notes that, in fact, a special law of professional liability can be distinguished, separate from the classical rules of civil and commercial law—an autonomous law of professional liability with many original elements. This field requires the establishment of special evaluation criteria to determine its legal nature, specific conditions, and foundational principles. One particular aspect of professional liability is the tendency towards the "contractualization" of the relationship between the professional and the beneficiary of their services. This trend personalizes the relationship between the professional and the client and leads to the creation of new types of legal relationships. The content of such contracts is a blend of clauses derived from legal provisions governing the professional's specific legal framework and clauses tailored to the particular circumstances of the client, to whom the professional provides services.

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The need for individualization in each situation, the precise determination of contractual content, and the adaptation of the professional's activity to the client's unique circumstances often result in the prevalence of contractual liability over tortious liability in cases of non-performance of contractual obligations.

Within this analysis, we cannot overlook an issue identified by legal doctrine: the possibility for a creditor—where the conditions allow—to choose between invoking contractual liability or tortious liability, depending on what is more advantageous. This issue is discussed in legal literature as the "cumulative liability" problem, which refers not to obtaining double compensation by invoking both types of liability simultaneously or combining them, but rather to the possibility of choosing between one type of civil liability or the other. Moreover, legal scholars firmly state that "the two types of liability cannot be combined or hybridized" (Pop, 2020: 189-193).

The conclusion that emerges is that the debate over whether an injured party, in cases of contractual non-performance by the debtor, has the right to choose between filing a contractual or a tortious claim remains unresolved, with divergent opinions both in Romanian legal literature and internationally. Scholars note that international doctrine allows both possibilities, depending on the legal system in question. For instance, in Germany, England, Switzerland, and Italy, the injured party has the option to choose the type of liability that is more favorable. Conversely, Quebec civil law, which has also influenced the Romanian Civil Code, initially permitted contracting parties to choose between the two types of liability. However, the current approach rejects this option and adheres to the opposite principle: the impossibility of choice.

The Romanian Regulation on Liability adopts the non-cumul principle, promoting the previously analyzed idea: if a valid contract exists between the parties and its non-performance results in damages, the creditor can claim and obtain compensation only under the rules of contractual liability. In other words, there is no right to choose between contractual and tortious liability.

This principle is expressly stated in Article 1350, paragraph 3 of the Romanian Civil Code: "Unless otherwise provided by law, neither party may exclude the application of contractual liability rules in favor of other, more favorable rules."

However, legal doctrine has identified exceptions to this rule. One such exception arises when the non-performance of a contract constitutes a criminal offense. In this case, the injured contracting party may seek compensation either before a criminal court (in which case liability is tortious) or before a civil court (where liability remains contractual). This choice exists regardless of whether the contractual breach committed by the other party was intentional, reckless, or negligent (Pop, 2020: 192).

Another notable exception is found in transport law, specifically in passenger transport, rather than in the transport of goods. Regarding the nature of the obligation, passenger transport involves both an obligation of result and an obligation recognized in legal literature (Pop, Popa, Vidu, 2012: 33-34) as a *safety obligation*—namely, to ensure that passengers arrive unharmed and safely at their destination. While safety obligations are not explicitly codified in legislation, they are considered a subset of obligations to do something, predominantly contractual in nature but sometimes legal. This obligation requires one party to guarantee the safety of the other party or even third parties against risks that threaten their physical security (Pop, Popa, Vidu, 2012: 33). When examining the broader legal framework, it becomes evident that safety obligations are particularly present in consumer law and transport law, especially in passenger transport.

Doctrine is divided on whether non-performance of a contractual obligation can simultaneously be a civil tort. In some contracts, the safety obligation is implied and mandatory for the debtor, as in passenger transport contracts, whereas in others, it is explicitly stipulated by the parties. It is evident that only a formal legislative regulation of safety obligations within the Romanian legal system can settle the existing doctrinal debates. At present, persuasive arguments exist in favor of both approaches, making the issue a matter of ongoing legal discussion.

**The liability of the goods carrier – general aspects.** Failure to fulfill the obligations assumed under a transport contract gives rise to civil liability for the carrier, as well as for the consignor or consignee, if the consignee has adhered to the contract.

With regard to the liability of the consignor and the consignee, the applicable rules fall under the general contractual liability framework. However, when it comes to the carrier, we observe certain legal particularities that distinguish their liability regime from the general rules of contractual liability. Furthermore, the legal framework governing the carrier's liability requires an analysis of two distinct types of liability: contractual liability and tortious (delictual) liability. Viewed as a whole, the liability of the carrier can be either contractual or tortious.

The legal framework for the carrier's liability is established, at a general level, by the provisions of the Romanian Civil Code: contractual liability is regulated under Article 1350, alongside the provisions in Chapter II – “Compulsory Enforcement of Obligations” from Title V – “Performance of Obligations”, Book V – “On Obligations”; while tortious liability is governed by: article 1349 (paragraphs 1 and 2) and article 1357 – liability for one's own actions; article 1349 (paragraph 3), article 1372 (paragraphs 1 and 2), and article 1373 – liability for the actions of another person, article 1376 – liability for damages caused by things under one's legal control.

At a general level, in the law of transport, the carrier's liability is also regulated by Articles 1959 and 1984-2002 of the Romanian Civil Code.

The carrier's tortious liability is governed by the general rules of the Romanian Civil Code, while the carrier's contractual liability is primarily subject to the provisions of special laws applicable to the transport sector. Only in the absence of specific provisions does the general legal framework apply—namely, the rules governing transport contracts and contractual liability under the Civil Code.

The contractual liability of the carrier, as regulated by special transport laws, generally follows the core principles of contractual liability established by the Civil Code.

Tortious civil liability is a specific sanction of civil law, applied for committing an unlawful act that causes damages and has a compensatory nature. Its current legal framework is established by Article 1349 of the Romanian Civil Code, which states that *every person has the duty to observe the rules of conduct imposed by law or local custom and to refrain from infringing upon the rights or legitimate interests of others through actions or omissions*. A person with legal capacity who violates this duty is liable for all damages caused and is obliged to fully compensate for them. Additionally, in specific cases provided by law, a person may be held liable for damages caused by the actions of another person, by things or animals under their control, or by the collapse of a building. Moreover, liability for damages caused by defective products is governed by special legislation.

From a doctrinal perspective, tortious civil liability is defined as "the obligation established by law, imposed on a person (the liable party), to compensate for the unlawful

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damage suffered by another person whose rights or legitimate interests have been violated, outside of any contractual relationship" (Pop, Popa, Vidu, 2012: 390).

Analyzing the carrier's liability in general, it is evident that the legal basis for holding the carrier accountable in transport operations has a dual nature: tortious (extracontractual) liability, arising from the violation of general obligations that stem from the carrier's status as a professional; and contractual liability, arising from breach of a transport contract concluded with each consignor individually.

An example of tortious liability is the carrier's failure to comply with the obligation to accept any transport request, within the limits of the type of transport provided. A professional carrier is in a permanent state of offering services to the public and is obligated to accept any transport request unless legal grounds exist for refusal.

This obligation is legally regulated in Article 1958, paragraph 3 of the Civil Code, which states that a carrier that offers services to the public must transport any person requesting their services and any goods for which transport is requested, unless there is a justified reason for refusal. Although the law does not explicitly define "justified reasons for refusal," such situations are found in special laws and transport regulations. Examples include: certain special-category goods that cannot be transported using the carrier's standard means, or hazardous goods, which may pose safety risks and therefore cannot be accepted for transport.

Outside of these exceptions, the carrier is legally required to accept any transport request, whether for scheduled line services or negotiated transport, unless a justified reason for refusal exists. Failure to comply with this obligation triggers tortious liability.

By performing a transport contract, the carrier assumes liability not only towards their contracting party (the consignor or consignee) but also towards third parties. There are cases where third parties suffer damages as a result of actions committed by the carrier in the course of their transport activity, outside the transport contract itself. For such cases, the carrier's liability falls under the category of tortious civil liability, as the harm caused is not contractually linked to the injured third party, but results from the carrier's general duty of care in their professional activity.

**The contractual liability of the goods carrier.** The contractual liability of the goods carrier presents numerous points of intersection with tortious liability in terms of conditions, enforcement mechanisms, and objectives. The fundamental principle underlying both forms of liability is the compensation for pecuniary damage caused by the unlawful and culpable act of a specific person. There are no essential differences between these two types of liability, as they share the same elements: the existence of damage, the existence of an unlawful act, the commission of the act with fault, and a causal link between the unlawful act and the damage.

However, there are notable distinctions between the two. Contractual liability arises from a contract, whereas tortious civil liability arises from an unlawful act. In contractual liability, only imprudence and negligence are recognized as forms of fault, whereas tortious liability includes all forms of fault. In contractual liability, the debtor's fault is generally presumed, whereas in tortious liability, the author's fault must typically be proven.

Furthermore, under contractual liability, the debtor is not liable for unforeseeable damages, while in tortious liability, under certain conditions, the author of the unlawful act may be held accountable for such damages. In contractual liability, the debtor must be

formally placed in default before enforcement measures can be taken, whereas in tortious liability, default occurs automatically from the moment the unlawful act is committed.

The current legal framework governing contractual liability is established by Article 1350 of the Romanian Civil Code, which stipulates that every person must fulfill the obligations they have undertaken by contract. If, without justification, they fail to meet this obligation, they are liable for the damage caused to the other party and are required to compensate for it in accordance with the law.

Unless otherwise provided by law, neither party may exclude the application of contractual liability rules in favor of other, more favorable rules.

Based on this legal provision, doctrine defines contractual liability as “that form of civil liability which consists of the obligation of a contracting party to compensate, in monetary terms, for the damage caused by the unjustified and culpable non-performance *lato sensu* of a contractual obligation” (Terzea, 2024: 91). The *lato sensu* non-performance of the owed service includes delayed performance, improper performance, or total or partial failure to perform (Pop, Popa, Vidu, 2012: 390).

The essential condition for engaging the contractual liability of the carrier is, first and foremost, the existence of a transport contract. To hold the carrier contractually liable, the transport contract must cumulatively meet the following conditions: it must be a legally valid contract; it must establish direct legal relations between the carrier and the consignor/consignee—that is, between the injured party (creditor) and the party responsible for the damage (debtor); and the damage must result from the total or partial non-performance of an obligation arising directly from the transport contract, i.e., from the contract linking the injured party to the author of the damage (Căpățină, 2000: 171).

The conclusion regarding the scope of contractual liability is that it must comply with these conditions. Under the Romanian legal system, anything that falls outside the scope of contractual liability belongs to the domain of tortious liability. Moreover, third parties with respect to the contract in question may invoke only tortious liability.

However, the situation of third parties is more nuanced and allows for exceptions, meaning that there are cases in which third parties, despite not being direct parties to a contract, may invoke contractual liability. One such example is the third-party beneficiary in a stipulation for another. A similar situation applies to the consignee in a transport contract, as these two types of contracts are often compared in terms of their structure. Also included in this category are direct actions within groups of contracts. Another exception is found in combined and successive transport, where, unless otherwise provided by law, liability in such cases may be pursued against the carrier who concluded the transport contract or against the last carrier. Although the last carrier did not participate directly or through representation in the conclusion of the contract, their liability for the deterioration or loss of goods remains contractual (Pop, 2020: 186-188).

If we refer to a “transport enterprise,” we are dealing with a legal entity, and the liability in question is no longer direct but rather a contractual liability for another.

The legal framework governing the contractual liability of the carrier, who is a professional, is considered by legal doctrine (Căpățină, 2000: 173-175) to be more stringent than general contractual liability. This increased severity arises from the carrier's commitment to delivering the transported goods to the consignee, making their obligation one *of result*. Consequently, any deficiency in execution may be equated with an unlawful act.



## **The contractual liability of the goods carrier under the regulations of the Romanian Civil Code**

The carrier's unlawful acts constitute the legal basis for engaging their liability and may involve non-performance, improper performance, or delayed performance of the contractual obligations assumed by the goods carrier.

In this regard, Articles 1984 and 1992 of the Civil Code establish that the carrier is liable for damages caused by: total or partial loss of goods (violating the duty of preservation), alteration or deterioration of goods occurring during transport (also violating the duty of preservation), delayed delivery of goods (regulated multiple times, involving a breach of the obligation to complete transport within a contractually or legally determined timeframe), and failure to perform the transport (the Civil Code does not specify how damages are calculated in this scenario).

These unlawful acts, expressly enumerated in the legal text, may lead to the carrier's contractual liability.

The transport contract is unique and indivisible, and the carrier's obligations terminate upon delivery of the goods to the consignee. Therefore, the period during which the carrier's contractual liability is engaged begins when the goods are entrusted for transport and ends upon their delivery to the consignee.

This interpretation aligns with Article 1984 of the Civil Code, which stipulates that total or partial loss, alteration, or deterioration of goods, as explicitly regulated by law, must occur *during transport* to trigger the carrier's contractual liability.

Legal doctrine (Baiaș, Chelaru, Constantinovici, Macovei, 2012: 1994) observes that the phrase *during transport* is not defined by the Civil Code. However, based on an overall interpretation of the legal provisions, this period is understood to span from the moment the goods are handed over for transport by the consignor to the carrier until the consignee takes possession of them. In other words, the duration of the carrier's contractual liability coincides with the period during which the carrier is bound by the duty to preserve the goods.

**The carrier's contractual liability for the loss of transported goods.** In general, *loss* is understood as the total disappearance of a good or a part of it. However, in transport law, certain situations are assimilated to total loss without constituting total loss *stricto sensu*. According to legal doctrine (Scurtu, 2001: 233), total loss also includes the loss of one package from a set of two or more delivered for transport when the missing package contains the main component of a machine, rendering the remaining parts unusable for their intended purpose. In this case, for the consignee, the loss is considered total. Additionally, total loss is also deemed to occur when the carrier is unable to deliver the goods, even if there is no certainty regarding their actual loss. In some cases, the legislator equates excessive delays in delivery with the loss of the transported goods.

Partial loss refers to any deficiency in number, weight, or quantity.

As with any type of contractual liability, to hold the carrier liable, the conditions for this form of liability must be met cumulatively: the existence of damage, quantified as the lost goods or parts of goods and the transport costs associated with them; the existence of an unlawful act, represented by the carrier's actions or inactions that result in the failure or improper fulfillment of the obligation to preserve the goods; the commission of this act with fault; and a causal link between the unlawful act and the damage suffered.

The Romanian Civil Code, Article 1985, expressly establishes the principle of compensating for damage based on the real value of the lost goods. The determination of the real value is based on the location and time of delivery for transport. Consequently, in

the case of loss, the carrier is required to compensate for *the real value of the lost goods or the lost parts of the transported goods*.

The rationale for calculating compensation based on the location and time of delivery for transport results from the correlation between Article 1985 and Article 1482 of the Civil Code. Article 1482 establishes that the obligation to preserve a good refers to the condition of the good at the moment the obligation arises. Applying this principle to transport contracts leads to the following conclusion: the obligation to preserve implies maintaining the transported goods in the same condition as they were at the time of delivery for transport. Thus, the damage caused by the non-performance or improper performance of the preservation obligation consists of depriving the consignee of the goods in the condition they were in at the time of delivery for transport.

In addition to compensating for the loss of goods, the carrier must also reimburse the transport price, the cost of ancillary services, and transport-related expenses, proportionally to the value of the lost goods or the diminished value resulting from their alteration or deterioration, in accordance with Article 1986 of the Civil Code.

Article 1987 of the Civil Code provides for the possibility of including a declaration in the transport contract regarding the value of the transported goods. The effect of such a declaration is that compensation for loss or damage is no longer calculated based on the real value of the goods but rather on the value established by the parties. If the value of the goods was declared upon delivery, compensation is determined based on that declared value.

However, Article 1987 of the Civil Code limits the parties' freedom in determining the amount of the declared value. If the real value of the goods at the place and time of delivery is lower, compensation is calculated based on that lower real value. In other words, the penalty for declaring an inflated value is that it will be reduced to the actual value of the goods at the place and time of delivery for transport.

**The contractual liability of the carrier for damage to transported goods.** *The damage* arises when there is a reduction in the quantity of a good or a deterioration in its quality, resulting in a decrease in value or a loss of the advantages the consignee intended to obtain from the goods (Scurtu, 2001: 233, Stănescu, 2017: 48-50).

To engage the carrier's liability, the cumulative conditions for this type of liability must be met: the existence of damage, quantified as the damaged goods or parts thereof and the transport costs related to those goods; the existence of an unlawful act, referring to the carrier's actions or omissions that lead to the failure or improper fulfillment of the obligation to preserve the goods; the commission of this act with fault; and a causal link between the unlawful act and the damage suffered.

Article 1985 of the Civil Code establishes the principle of compensating damages based on the real value of the goods. The determination of the real value is made by reference to the place and time of delivery for transport. Consequently, in the event of alteration or deterioration of the goods, the carrier is obliged, according to civil law provisions, to cover the depreciation in value, with this depreciation being calculated based on the real value of the goods.

Legal doctrine (Baiaș, Chelaru, Constantinovici, Macovei, 2012: 1994-1998) notes that the legal text does not explicitly define the legal nature of declaring the value of transported goods. However, considering its effects, the declaration of value cannot be

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regarded as anything other than a conventional evaluation of the goods' value, as it does not meet the requirements to be classified as a penal clause.

Additionally, the carrier must reimburse the transport price, the cost of ancillary services, and transport-related expenses, in proportion to the decrease in value caused by the alteration or deterioration of the goods, as stipulated in Article 1986 of the Romanian Civil Code.

**The contractual liability of the carrier for failure to perform transport.** It is established under Article 1992 of the Civil Code, which holds the carrier liable for any damage caused by the non-performance of transport. Special legislation determines, in detail, the specific conditions for engaging liability in each type of transport, as well as the limits within which this liability operates. As a general rule, the carrier is liable for the damage caused by the failure to carry out the transport.

Although the legal provisions governing the contract for the transport of goods are considered sufficient in addressing various legal issues, it is noteworthy that the Romanian Civil Code, within its regulations on the contract for the transport of goods, does not provide a solution for determining the damage caused by non-performance of transport.

Legal doctrine (Cotuțiu, 2015: 120-122) has argued that, in such situations, given that civil law serves as the general framework in relation to transport law, the applicable solution should be drawn from general legal principles, particularly Article 1531 of the Civil Code, which upholds the principle of full compensation. This article grants the creditor the right to full reparation of the damage suffered due to non-performance, which includes both the actual loss sustained by the creditor and the benefit of which they have been deprived. Additionally, depending on the circumstances, the creditor may also be entitled to compensation for non-pecuniary damage. In determining the extent of the damage, consideration must also be given to the expenses reasonably incurred by the creditor to prevent or mitigate the loss.

This approach aligns with the principles governing tortious civil liability, as reflected in Article 1385 of the Civil Code, which sets out the scope of compensation.

Of course, while these principles form part of the general legal theory governing contracts for the transport of goods, special laws take precedence. Therefore, the specific provisions of special transport laws will apply first, both in terms of calculating compensation and in determining cases where liability may be limited or aggravated.

**The contractual liability of the carrier for delay** is regulated under Article 1969 of the Civil Code, which establishes the principle that transport must be carried out within the time agreed upon by the parties. This is the general rule. If the parties have not set a specific timeframe, it is presumed that a timeframe still exists, and it will be determined based on the practices established between the parties, the customs applicable at the place of departure, or, in the absence of such criteria, based on the particular circumstances of the transport.

If the carrier fails to complete the transport within the agreed timeframe, they may be required to pay compensation to the entitled party. According to legal provisions, when a transport document is issued, it must specify the timeframe for performing the transport (Article 1961, paragraph 2 of the Romanian Civil Code). Additionally, under Article 1984 of the Civil Code, the carrier is liable for damages caused by the delayed delivery of goods. A delay in delivery constitutes a breach of the obligation to perform transport within a

specific timeframe, whether established by contract or by law. The parties may agree on a single global deadline for the entire journey or divided timeframes for each stage of the itinerary.

Furthermore, Article 1992 of the Civil Code regulates not only non-performance of transport but also liability for delays. Thus, the issue of delayed transport and the carrier's liability for the resulting unlawful act is extensively regulated by the Civil Code (Baiaș, Chelaru, Constantinovici, Macovei, 2012: 2000; Cotuțiu, 2015: 119-120).

Currently, some carriers operate under timeframes established by law or regulatory authorities, others set their own deadlines unilaterally and make them publicly known, while some negotiate them contractually (Scurtu, 2001: 50-59).

Special legislation determines, in detail, the specific compensation amounts for transport delays and the limits within which this liability applies for each mode of transport. However, as a general principle, the carrier is liable for damages caused by delays. Although not expressly stated, the legal framework suggests that refunds of the transport price and transport expenses apply only in cases of loss or damage to goods, not for delays.

**Liability in special cases where the carrier may refuse transport.** Article 1988 of the Civil Code regulates special cases in which the carrier may refuse to perform transport. This regulation addresses two key aspects: the carrier's freedom to accept or refuse the transport of a certain category of goods and the exceptional legal framework applicable when the carrier accepts such goods for transport, deviating from general liability rules. According to legal provisions, the carrier is not obliged to transport documents, cash, securities, jewelry, or other high-value goods.

If, however, the carrier agrees to transport such goods, they are liable only for the declared value in case of loss, damage, or deterioration. Moreover, if the nature of the goods or their value was misrepresented, the carrier is fully exonerated from liability.

Article 1988 of the Civil Code must be interpreted in conjunction with Article 1958, paragraph 3 of the Civil Code, which establishes the carrier's general obligation to transport any goods for which transport is requested, unless there is a justified reason for refusal. Thus, Article 1958, paragraph 3 serves as a general rule, while Article 1988 provides an exception to this rule.

From the perspective of the carrier's liability, invoking the situations regulated by Article 1988 is tantamount to the absence of an unlawful act, which is the basis for engaging tortious liability.

Additionally, it should be noted that Article 1988 does not prohibit the conclusion of a transport contract for documents, cash, securities, jewelry, or other high-value goods. Instead, it establishes a protection mechanism in favor of the carrier who accepts such a contract. Thus, according to this article, in the event of a breach of the preservation obligation due to loss, damage, or deterioration of the transported goods, the carrier is liable only for their declared value.

If a different nature of the transported goods was declared, the carrier is fully exonerated from liability. Likewise, if a higher value than the actual value of the transported goods was declared, the carrier bears no liability.

**The contractual liability of the carrier who undertakes to transport goods using another carrier's lines.** Under Article 1998 of the Romanian Civil Code, a carrier executing a transport contract may commit to carrying out the transport either exclusively

## **The contractual liability of the goods carrier under the regulations of the Romanian Civil Code**

on their own operational lines or in combination with the lines of another carrier. When both types of operational lines are used—those of the initial carrier and those of another carrier—Article 1998 of the Civil Code provides two distinct solutions. For transport carried out on the initial carrier's own lines, the classic liability regime applies, governed by the specific provisions of the contract for the carriage of goods. However, for transport conducted on another carrier's lines, the initial carrier's liability is governed by the legal framework of a commission contract, as the initial carrier assumes the status of a commission agent (comisionar-expeditor). In other words, the initial carrier does not personally perform the transport on another carrier's lines but instead hands over the goods for transport to be executed by the carrier whose operational lines are used (Baias, Chelaru, Constantinovici, Macovei, 2012: 2004).

The liability of the commission agent (comisionar-expeditor) differs from that of a carrier. The commission agent is liable not only for their own actions but also for those of the carrier, as they are the party responsible for organizing the transport. Furthermore, the commission agent is also liable for the actions of the person they have substituted in their place. Additionally, the commission agent is personally liable toward third parties with whom they have contracted for the organization of the transport.

In a broader legal context, the liability of the commission agent is structured on two levels: liability for their own actions and liability for the actions of others. Within the freight forwarding contract, the legal provisions governing liability include Article 2068 of the Civil Code, which regulates a specific segment of the commission agent's liability, namely liability for transport delays, loss, destruction, theft, or damage to the goods.

**Liability for cash on delivery and customs formalities.** The carrier's liability for collecting cash on delivery (COD) amounts imposed on the transport by the consignor and for fulfilling customs operations is regulated by the rules governing mandates (Article 1993 of the Romanian Civil Code).

The transport price may be paid either by the consignor or the consignee. The consignor also has the option to pay the price provisionally at the time of handing over the goods, while requiring the carrier to collect the transport price from the consignee upon delivery and subsequently remit the amount to the consignor. This process is referred to as contra cash on delivery (CCOD).

The Civil Code does not define the concept of COD, but according to rail transport legislation, COD is a procedure through which the consignor uses the services of the railway transport operator to collect the value of the transported goods from the consignee.

COD may apply not only to the transport price but also to the price of the transported goods themselves. In such cases, the carrier is obligated not to release the goods to the consignee until the outstanding amount is paid. If the carrier fails to comply with this obligation, they will be required to compensate the consignor for the resulting loss.

**Liability in successive or combined transport.** Unlike previous legislation, the current legal framework, as defined by Article 1957 of the Romanian Civil Code, explicitly distinguishes between successive transport and combined transport.

Successive transport refers to transport carried out by two or more successive carriers using the same mode of transport. In contrast, combined transport involves the same carrier or successive carriers using different modes of transport. In both cases,

carriers take over and hand over the transported goods to each other until they reach their destination, without the consignor's intervention.

Regarding liability for this type of transport, unless otherwise provided by law, in the case of successive or combined transport, a liability claim may be brought against either the carrier who concluded the transport contract or the final carrier in the chain.

In terms of compensation, each carrier is liable for damages in proportion to their share of the transport price.

However, if the damage was caused intentionally or due to the gross negligence of one of the carriers, that carrier bears full responsibility for compensation. Additionally, if a carrier proves that the damage did not occur during their portion of the transport, they are not required to contribute to the compensation.

If the condition of the goods is not documented when transferred to the next carrier, it is presumed that they were handed over in good condition from one carrier to another.

In successive or combined transport, the final carrier represents all preceding carriers in matters concerning the collection of transport fees and the exercise of contractual rights. If the final carrier fails to fulfill these obligations, they are liable to the previous carriers for the amounts due to them (Articles 1999-2000 of the Romanian Civil Code).

**Final Aspects.** In terms of the legal framework governing its liability, the carrier, as a professional, is subject to a dual liability regime: tortious liability, when breaching professional obligations established by law, and contractual liability, when entering into a contract with a client. Additionally, the professional's liability is tortious when third parties suffer damage in relation to the contract as a result of the carrier's professional activity.

The expertise that a professional benefits from in their field is a key element that differentiates them from a private individual and requires a higher standard of conduct, which must be assessed with greater severity. For this reason, the contractual liability regime of the carrier, as a professional, is considered by legal doctrine to be more stringent than general contractual liability. This is due to the carrier's fundamental obligation to deliver the transported goods to the consignee. Consequently, this obligation is one of result, meaning that any failure in performance may be equated with an unlawful act.

The carrier's unlawful acts form the legal basis for engaging their liability, which may arise from non-performance, improper performance, or delay in fulfilling the contractual obligations undertaken in the transport of goods. In this regard, the Romanian Civil Code expressly provides that the carrier is liable for damages resulting from total or partial loss of goods, alteration or deterioration of goods occurring during transport, delay in delivery, and failure to carry out the transport. These unlawful acts, explicitly enumerated in the legal text, may lead to the engagement of the carrier's contractual liability.

In the realm of contractual liability involving professionals, there is a contradictory dynamic. On one hand, there is a growing need for adhesion contracts, driven by the fast-paced nature of modern life, which demands efficiency in legal transactions and leads to the standardization of contracts concluded by professionals with private individuals—a phenomenon referred to as the "instrumentalization" of contracts. On the other hand, there is an increasing need to protect private individuals, which manifests legally in the necessity to individualize each case, precisely define contractual

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terms, and adapt the professional's activities to the unique situation of each client. This latter aspect often leads to the prevalence of the contractual liability regime over tortious liability when a professional breaches their contractual obligations.

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## ORIGINAL PAPER

# Translating Texts with Sports Terminology versus Literary Translation – Similarities and Differences

Ileana Mihaela Chirițescu<sup>1)</sup>, Floriana Anca Păunescu<sup>2)</sup>

### Abstract:

The translator is the person who equates the meaning of a text from one language to another. The translator uses language to translate the culture of a people. Translation is an art, and certainly not an easy art.

Universal literature or specialized literature in Romanian could not exist if there were no translators.

Translators must have a perfect command of both the source and target languages. Only in this way, the translated text can have the meaning that the author gave it at the time of writing. The translator creates a bridge between the two languages, the one they are translating from and the one they are translating into, thus giving access to valuable information written in languages that not everyone can know. The role of the translator can be a primary one because without translated texts, the world of letters would have been infinitely poorer. In addition to mastering the two languages, the translator must also be well versed in the field in which he is translating. He must be a specialist in the field in which he performs the translation, so the versatility of the person doing the translations cannot be disputed.

**Keywords:** *translator, translated text, specialized language, sports terminology.*

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## **Translating Texts with Sports Terminology versus Literary Translation – Similarities and Differences**

### **Introduction**

According to Becker “sport belongs to a wonderful and childish world; he representing the eternal youth of the human being”. (Becker, 1972:104)

The translation of texts for specific purposes is a different translation than the literary translation which allows a wider interpretation of the translated text. Literary translation can deviate a little from the original text by using synonymy and metaphorizing epithets. Translation for specific objectives requires the mastery of specialized terms from the field in which the translation is carried out. The role of the specialized translator is to distinguish between the two types of translations and to use specific means for each of them.

According to Luca “starting from the views according to which terminology is essentially a linguistic and cognitive activity, and the terms are linguistic units that convey a conceptual meaning within the texts of specialized knowledge, I conceived the present work as an approach, within which the terms are analyzed in their complexity, both as units that fit into a terminological system, and as dynamic lexical units, which manifest their term status in specialized discourse (texts, contexts, co-texts)”. (Luca, 2019:9)

### **Literary translation – between technique and art**

Literary translation is a difficult exercise that requires real writing skills to bring out all the skill of an author, the musicality of his writing, the rhythm of his sentence. And the translator must disappear behind the work and make the reader forget that he is reading a translation. Translation is an exercise in interpreting ideas, which requires a lot of mental agility and writing skill. Also, knowledge of the two languages, the one from which one is translating and the one into which one is translating, are essential things.

According to Bărbuceanu “Literacy generally highlights the capacity of humans to decode reading and writing, but in the twenty-first century, literacy has other values added to the meaning, that of understanding and connecting data through a variety of media formats, using phone applications, imageries, video, audio, and digital texts. Phones, nowadays, are not merely objects of conveying oral messages, they no longer serve this intended purpose, now, phones or smartphones are digital devices, with computer memory, satellite identification and wi fi structures incorporated, with running application, mini portable computers, which can access information from every corner of the world, from libraries and dictionaries with a single touch set”. (Bărbuceanu, 2021:178)

From one translated text to another there is a movement, an emotion, a constant challenge. Before moving on to the actual translation, the translator must understand the text he has to translate. Translation can also be called as a rewriting of the text. The translator leaves his mark on the translated text.

The role of the translator as a bridge for «translating» values between cultures has been discussed since the time of Terence, the second-century BCE Roman adapter of Greek comedies.

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According Sfetcu “the role of the translator is, however, by no means a passive, mechanical one, so that he has been compared to that of an artist. The main reason seems to be the concept of parallel creation considered by critics like Cicero. Dryden observes that «Translation is a kind of drawing after life...» The comparison of the translator to a musician or actor is older, with at least Samuel Johnson's remark about Alexander Pope playing Homer to the music of a flageolet, while Homer himself he used a bassoon”. (Sfetcu, 2014:4)

Included among the traditional methods recognized to be used in school since the 19th century, translation has been used consistently to this day. The main purpose of this methodology was the reading and translation of literary texts in a foreign language, which therefore placed the spoken word in the background.

Maria Brăescu speaks of two main tendencies of this method: “a synthetic tendency within the framework of the grammatical method and an analytical tendency within the framework of the lexical method. Followers of the «grammar and translation» method offer as a working tool:

1. a grammar book where the student finds rules and explanations that refer to a normative conception more often than to a coherent description of the language system;
2. a bilingual dictionary where the student finds long lists of words, grouped by area of interest, attached to their equivalents in the native language;
3. texts to be translated one way or the other, preferably literary texts”. (Brăescu, 1979:28)

In his opinion the grammatical (synthetic) method pays particular attention to grammar which must be studied in a mechanical way without any relation to the text. We teach morphology first, then syntax. The rules, then the examples are learned by heart. The reading of the text follows the grammar.

According Chirițescu and Păunescu “ legal translations and documents drafting, could not function without knowing the social and cultural background of the language, as legal translations reveal meanings within certain situations or contexts”. (Chirițescu, Păunescu, 2020:259)

The lexical (analytical) method puts in the foreground the detailed study of the text with its translation. This method reflects the dominant linguistic conceptions of the respective period: myth of grammar, identification of language and thought, identity of notions in different languages, etc.

The direct methodology, introduced in France in 1901, is systematically opposed to the traditional grammar-translation method because of its direct principle.

According Christian Puren it uses the principles of the «natural method», such as:

– “the direct and intuitive method: the child accesses meaning directly, by relating the sounds he hears to the objects shown to him, the gestures and expressions of those close to him;

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- the oral method: the only linguistic reality remains for a long time exclusively audio-oral for the child;
- the active method: the child learns to speak by speaking; the motor of this activity is the need, the interest or the pleasure, and its object the familiar and concrete world which surrounds it, and on which it can act;
- the imitative method: the child learns by imitating, even before understanding them, the sounds produced by his relatives;
- the repetitive method: the linguistic forms are engraved in the mind of the child thanks to constant and intensive hearing and reuse”. (Puren, 1988:112)

According Stoian “Therefore, students/ learners feel the need to be independent, to try to learn on their own. This new tendency should take into account that foreign languages need special filters for the abundance of online information”. (Nedelcuț, 2024: 213)

A scheme of the translation is made, with the main ideas, with the coherent theme. First they reflect on the text, only then they move on to the actual writing. You have to find a way to capture the attention of the readers. The translated text must be faithful to the original writing, but equally, take the inflection of the language into which it is translated and transpose the lexical artifices used by the translator.

According Scorțan “The psycho-affective dimension in building a team is not negligible. Of course, it is easier to work with people „that we like”, but the question that arises is rather to know how to work together while going beyond emotional divisions”. (Scorțan, 2024: 145)

Maria Brăescu indicates the main methodological ideas of this method:

- a) “the teaching of a language takes place through the same natural pathway that is seen in the acquisition of the first language; translation is completely banned from the classroom;
- b) the meaning is explained either by the direct presentation of objects or actions (the teacher ostensibly opens the classroom door and declares: «I open the door»; or by the representation of objects (drawings, photos, engravings) For abstract concepts, definitions, synonyms and antonyms are used, or the meaning is deduced from the context;
- c) grammar takes a secondary place; it is taught through the practice of the language; the method used for teaching grammar is induction;
- d) students are never given isolated words, but coherent sentences and texts”. (Brăescu, 1979:29)

Any collection of terms used in a certain field of knowledge represents a complex, logically structured system and ranked.

According Sfetcu “the role of the translator in relation to a text has been compared to that of an artist, for example a musician or actor, who interprets a work of art. Translation, like other arts, inevitably involves choices, and choice involves interpretation”. (Sfetcu, 2014:14)

To draw a parallel with the sports world, we could say, following Jean Paulhac's model, that the translator must defeat the text he has to translate, no matter what category it belongs to:

According Paulhac “L’athlète allemand ou français dominé est le plus souvent battu. L’athlète anglais continuera à se battre alors que la logique lui dit qu’il est battu. Et sa belle stupidité risque une fois de plus de faire de lui un vainqueur”. (Paulhac, 1954:33)

The automatic translation would be this: “*The dominated German or French athlete is most often beaten. The English athlete will continue to fight even though logic tells him that he is beaten. And his beautiful stupidity risks once again making him a winner*”.

However, the logical translation is different: “*The German or French athlete who is dominated, most often, is the defeated one. The English athlete will continue to fight even if, logically, he knows that he will be defeated. And it is precisely this stupidity of his that will make him, once again, victorious*”.

Nowadays, there are a multitude of technical means that help both teachers and students translate texts from one language to another. There are websites and programs that help students compare their translations simultaneously.

According Bărbuceanu “Technology allows the digital native to feel that easiness they experience when they surf the internet for information, it is the at home, relaxed freedom to touch, multitask, search and discover the subject, making them independent learners, who have incorporated the power that is already in the hands of students”. (Bărbuceanu, 2020:140)

### **Translations with sports terminology**

According Benraho “Why do we teach «technical or scientific French» rather than French? Why do we describe a specialty language rather than the language itself for automatic processing? These two attitudes imply that there are special languages that stand out from a total language or at least from the particularities inherent in scientific and technical language. What makes a doctor's note, a court order, a maintenance notice different from what we want to call ordinary language”? (Benraho, 2015:11)

Sports terminology is complex and in constant movement and formation, as is the field in which it originates. Currently, the field of sports is one of the most accepted and loved by the general public. Sports attract masses of people from all corners of the world, uniting them through the dedication they all have for practicing a certain sport or simply practicing physical movement in ordinary everyday life. Football, handball, tennis, gymnastics, sports dance, winter sports, all these are activities loved all over the world.

“Sports terminology refers to the important words used in the field of sports. It is important to know about various sports terminology. This increases general awareness and helps enjoy sports programs to the maximum”. (<https://data-flair.training/blogs/sports-terminology/>)

## **Translating Texts with Sports Terminology versus Literary Translation – Similarities and Differences**

Sports terminology is perhaps the most used and widespread terminology because sports are present everywhere on the planet. Not only linguists or translators are familiar with sports terms, but the whole world uses these terms, hears them in sports commentary. We all use sports terminology when we watch a football, handball, basketball match on TV, when we watch gymnastics, tennis, boxing, winter sports or a sports dance competition. We don't need to be knowledgeable about the sport itself, nor about the linguistics, we just need to love sports in general and practice it at any level, and this will lead us to know sports terminology.

According to Becker “The relationship between sport and society is a very strong one. Does sport provide a model for society? Does sport prepare us for life? On the contrary, is sport a marginal phenomenon?” (Becker, 1972:101)

In terms of motivating students to learn sports terminology, this is an achievable one given their motivation through the admiration they have for one sport or another.

According to Altmanova “In the teaching of an L2, sport, as the main motivating factor, is already quite widespread. It is a link and an instrument of social integration between learners, especially learners from different ethnic backgrounds. Sports rules, shared by adolescents/learners, are often the only body of knowledge from which communication can begin”. (Altmanova, 2012:110)

Sports create interpersonal relationships from the friendships formed between children in kindergarten to the closest relationships formed between adults.

According to Becker “A child’s life is nothing but a continuous game. Games imply freedom and spontaneity”. (Becker, 1972:11)

Games must contain specific language. The specific language must be mastered by all actors, participants in those games. Thus, since childhood, a language specific to games, or better said, specific to sports, is created.

According to Caillois “There is also no doubt that play must be defined as a free and voluntary activity, a source of joy and amusement. A game which one would be forced to play would at once cease being play. It would become constraint, drudgery from which one would strive to be freed. As an obligation or simply an order, it would lose one of its basic characteristics: the fact that the player devotes himself spontaneously to the game, of his free will and for his pleasure, each time completely free to choose retreat, silence, meditation, idle solitude, or creative activity”. (Caillois, 1961:6)

Referring to the pleasure that games and playing sports can bring to people's lives, we chose a quote from a great French writer who described with great pleasure his childhood and the games he played with his cousins.

According to Gide “My cousins who shared my taste for this game, but were less patient, shook the device each time to contemplate a total change. I did not proceed in the same way: without taking my eyes off the scene, I turned the

kaleidoscope gently, gently, admiring the slow modification of the rose window. Sometimes the imperceptible displacement of one of the elements led to overwhelming consequences. I was as intrigued as dazzled, and soon wanted to force the device to reveal its secret to me. I uncorked the bottom, counted the pieces of glass, and took three mirrors out of the cardboard sheath; then put them back; but, with them, more than three or four beads. The agreement was poor; changes no longer caused surprise; but how well we followed the games! how well we understood the reason for pleasure"! (Gide, 1924:19)

Sports unite people from all continents, so sports terminology is the most widespread and the easiest to understand. Without in any way underestimating the role of the specialist translator, we must mention the fact that people in sports sometimes understand each other without speaking the same language. There are countless sports teams that have coaches of other nationalities who do not speak the language of the team they are coaching.

According Caillois "In addition, a strict and absolute code governs amateur players, whose prior assent seems like the very condition of their participation in an isolated and entirely conventional activity. But what if the convention is no longer accepted or regarded as applicable? Suppose the isolation is no longer respected? The forms or the freedom of play surely can no longer survive". (Caillois, 1961:44)

There are many athletes who are active in several club teams, from several countries, without knowing the language of the respective countries. For example, there are Romanian athletes active in countries such as China, Japan, or at various sports clubs on the African continent. No one expects these athletes to know the language of the country they have chosen to represent.

There are countless Romanian coaches who train teams or athletes from the Asian or African continent. Sports language is accessible, that's why these things described above are possible.

Terms like - *captain, catch, champion, coach, compete, competition, competitor, contest, court, course, cup, defend, fan, field, final score, fitness, goal, gym, half-time, judge, league, lob, manager, offside, pass, penalty, perform, performance, physique, player, record, rules, score, serve, shoot, skill, spectator, stadium, strategy, tactics, talent, teammate, teamwork, tournament, trainer, trophy, victory* - are used and recognized anywhere on the planet.

In sports terminology, terms of French and Anglo-American origin predominate.

From the French language, terms such as - *attitude, effacé, passé, tire-bouchon, en passant, duplex, pièce touchée, pièce jouée*.

From the English language, terms such as - *arm wrestling, bodybuilding, bandy, baseball, curling, fotbal, golf, handbal, hochei, kitesurfing, paintball, rugbi, snowboard, scrabble, snooker, softball, skandenberg, rafting river, scheleton, skateboard, squash, wrestling, yachting, zorbing, aut, corner, dribling, drop, event, fault, forward, gol, goalkeeper, golgheter, half, ofsaid, outsider, stoper, time blitz, peel-off, play-blitz, aut, break, draw, footing, forcing, groggy, knock-down, knock-blitz (ko), non combat, non contest, upercut, ring, backhand, forehand, ghem, set, setbol, smeș, tie-break, topspin, knee up, kick, jumping kick, outdoor, outsider*.

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In sports terminology there are also Greek elements - *biatlon, triatlon, pentatlon, hexatlon, heptatlon, decathlon*.

Elements borrowed from the Japanese language should not be omitted either – *aikido, judo, age, ago, kata, aiki no sen, ashi, ashi-garami, ashi-gatame, bushido, shido, ippon, yuko, kohaku, ko soto gake, ko soto gari, ko uchi gari, kyo, shisen-tai, migi shisen tai, o soto gari, o uchi gari, kouchi gari, kansetsu waza, uci mata, okuri ashi barai, komi ashi, shime waza, juji jime, hadaka jime, waza ari*.

Korean language terms are also mentioned – *Taekwondo, junbi seogi, charyeot seogi, naranhi seogi, juchum seogi, ap seogi, ap kubi seogi, moa seogi, chuchum seogi, momtong jireugi, ap kubi seogi momtong bandae/baro jireugi, ap kubi arae makki, ap kubi momtong an makki, ap kubi olgul makki, ap chaoligi, yop chaoligi, ap chagi, dollyo chagi, bi chagi*.

According Burtea-Cioroianu “We must know how to use the right text depending on the social and intercultural context, because we do not speak to all interlocutors in the same way, but differently depending on the various intentions we have and the place where we are”. (Burtea-Cioroianu, 2023:121)

The mentioned terms represent only a small part of the specialized terminology in the field of sports, which a specialized translator must master.

According Chirițescu and Păunescu “Collective discussion involves the organized exchange of ideas, impressions, information and criticism, the purpose of which is to deepen or study a notion, concept or theory. Oral expression is the targeted skill of this work technique that explores creativity”. (Chirițescu, Păunescu, 2024: 243)

Of course, sports terms can be classified according to each sport, how they were formed, when they were formed, whether they are widely used or not. But we in this paper do not deal with the sports terminology from a philologist's point of view, but we try to emphasize the fact that sports unite people not only because they can easily understand each other without speaking the same language, but also because sports it means openness, vision, free spirit, positivism, smile.

Translating sports texts involves both playfulness and seriousness.

According Duhamel “I want to play. He looks preoccupied, worried, as if to say - I want to work. And he's right - because the game is his primary concern, his duty. What can we ask him first? To play, but to play conscientiously, with patience and with ingenuity”. (Duhamel, 1945:16)

Sport has its own language that goes beyond words, phrases, terminology. Sport speaks for itself through what it shows, what it releases, what it gives.

According Choupaut “To understand the language of sports is to place it in the complexity of its social, political and economic evolution, it is to grasp, for example, the tension between the apparent universalism, sometimes advocated, of modern sport and therefore of the linguistic standards that it imposes and which legitimizes it, and its past and current forms of diversification, the social uses of

which must be placed in an economy of symbolic exchanges and power relations”. (Choupaut, 2021:2)

Sports terminology is part of the specialized terminology and must be documented as such. Texts that involve sports terminology are specialized texts, and sports is a vast field with many branches. Specialized translators must be good experts in the field of sports, but also very good experts in sports language. Specialized texts require specialized translation, specialized texts in one field or another cannot be translated word for word. They must be integrated into contexts.

### **Conclusions**

In conclusion, the translator of text containing sports terminology must be a big fan of sports. Because he must rather understand with his spirit and soul what he has to translate. Sport gives life, the translator also gives life to the sports text, making it accessible in a language other than the one in which it was written.

The translation of a text requires climbing it, just as the mountaineer must climb the mountain, being prepared for all the obstacles that it might bring in his way.

According Rebuffat “Therefore, an ascent is not only an escalation of a mountain of rock and ice, but it also implies an itinerary that must be found, passages that must be connected to each other, a well-established schedule”. (Rebuffat, 1979:28)

Sports unites people from all corners of the world, the translator makes accessible information about sports competitions from anywhere on the planet, about interviews with great athletes, about competitions and their role.

Regarding the difference between the translation of a literary text and the translation of a text with sports terminology, we draw attention to one fact. In both cases, the translator must have a very good command of both languages to know how to transpose the information into the language in which he is translating, in such a way as to respect the linguistic norms of the language in which he is translating.

According Chirițescu and Păunescu “Growing aware of professional specialisation and lifelong learning requirements to meet the contemporary market demands, translators undertake considerable efforts to answer both general and specialised translation loads”. (Chirițescu, Păunescu, 2020:254)

The literary text requires a greater adaptability of the language. Text with sports terminology requires knowledge of sports terms to be able to use them correctly in contexts and also knowledge of the field of sports in general.

### **Authors' Contributions:**

The authors contributed equally to this work.

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## Translating Texts with Sports Terminology versus Literary Translation – Similarities and Differences

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## ORIGINAL PAPER

# Theorizing Digital Security Governance and Biometric Data Inputs based on Research Topics and Online Mentions Tracking

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### Abstract:

**Introduction:** Research on topics in the field of digital security governance and biometrics presents multiple opportunities for analysis depending on the conceptual framework and informational support of data collection.

**Research objectives:** This study initiates and engages in a complex and interdisciplinary investigation of topics in the field of digital security governance and biometric data. The primary objective focuses on the analysis of the frequency of use in the scientific literature of the most important concepts associated with the two fields, and the second objective of the study illustrates the acceptability and circulation of relevant topics in the digitized literature.

**Research methodology:** The research uses the Google Ngram Viewer technique to select, collect and extract over twenty topics and other phrases relevant to the analysis of digital security governance and biometrics in the period 2000-2022. For the selection of topics and associated phrases, we will use the specific terminology provided by the International Organization for Standardization (ISO/IEC 2382-37:2022, Information technology — Vocabulary Part 37: *Biometrics*) (edition 3, 2022), but also the collection of sources and references provided by the World Bank (Practitioner's Guide) regarding the fields: biometric identification, legal and digital identity, privacy framework, personal data, data protection, digital signatures, e-governance and information technology.

**Results and discussion:** The results of the online investigation offer multidimensional perspectives on digital security governance, biometrics and behavioral biometrics,

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projecting the applicability of the topics for data security and information confidentiality. The results also indicate the importance of the biometric component and the role of the characteristics of the technologies.

**Conclusions:** The conclusions of the study provide an overview of the taxonomy of topics in the digital security governance and biometrics, but also an indexing of the highest conceptual frequencies. The limits of the research are also discussed, as well as future directions for analysis.

**Keywords:** *digital security governance, biometrics, biometric data, legal and digital identity, e-governance.*

### **Introduction**

The increase in Denial of Service and ransomware cyberattacks has led to numerous breaches of cybersecurity protocols in recent years. With the increase in attacks and the vulnerability of personal and biometric data protection systems, the scientific community has expanded the scope of research in the field of digital security (Kavitha, Prasannakuma, Pranav, 2024) with the aim of identifying the most secure connection methods, biometric data security keys and authentication applications, including facial ID connection, as well as other facial and fingerprint recognition possibilities and the approach to human security developments and features (Olimid, Georgescu, Olimid, 2024a).

The research reflects a deep interdisciplinary and multidisciplinary character, being based on knowledge from (a) the field of biometrics, personal data and genetic data: fingerprint, facial recognition, biological properties, psychological characteristics (Olimid, Rogozea, Olimid, 2018); (b) the legal field: legislation on personal data and the processing of such data, equal provisions on data breaches, free movement of personal data and risk assessment; (c) the field of digital security and data management: using a password, unlocking a system, password leaks, password transfer.

In this context, the present research approach investigates a broad evolution of the use of topics in the field of digital security governance and biometrics by using the Google Ngram Viewer platform. The investigation also has the role of highlighting in the first part of the research how the scientific literature digitized by Google has accessed, employed and used these topics in the field of biometric login and identity verification. At the same time, the most important frequency notifications of the selected topics will be expressly mentioned and specific discussions and analyses will be developed regarding the appropriateness of using the topic or the associated phrase of words.

The paper delimits in the final section the limits of the research regarding human security personal data, their protection and free circulation (Olimid, Georgescu, Olimid, 2024b). Also, in considering the arguments presented, guidelines are offered for future research in the field of digital security and biometric data.

### **Literature review**

The analysis of the digital security governance and biometric data field in the dedicated literature review section primarily reflects the criteria used to collect and analyze relevant information by focusing on the most important topics, concepts and word

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associations, as well as theories and applicable models of digitized literature in the analyzed period.

This category includes thematic domains of recent scientific literature focused on the analysis of security vulnerabilities and the impact on biometric systems (Abdullaeva, Imamverdiyev, Musayev, Wayman, 2008), as well as new trends and developments in the field of biometric security (Maguire, 2009; Bromby, 2010; Ross, Banerjee, Chowdhury, 2020).

The second criterion for selecting works records the role of standards, classification criteria and methodologies for the specific category of selected topics, but also for the classes of concepts of the research area namely: (a) approaches to biometric security, financial systems and digital payment solutions (Maskey, 2024); (b) research patterns and links between AI, big data and biometric authentication (Mukkamala, Mahida, Vishwanadham Mandala, 2024) and (c) factual and categorical analysis data related to biometric-based physical and cybersecurity management (Obaidat, Traore, Woungang, 2019).

Thirdly, another important criterion for selecting relevant works must target both the theoretical and applied foundations of the research field of digital security and biometric data and distinguish essential information chronologically and thematically, including relevant research on: (a) authentication systems and behavioral biometrics published in the last two years (Oduri, 2024; Sett, Gupta, 2024; Shafik, Tufail, Apong, Balasubramaniam, 2024; Sriman, Thapar, Alyas, Singh, 2024, January); (b) relevant aspects for digital security and e-commerce (Patil, Dudhankar, Shukla, 2024).

Numerous studies have revealed and analyzed concerns over biometric security and information security breaches, mechanisms and services (Singleton, 2003: 1-24). Several studies have focused on analysing biometric systems enhancement of authentication through deep learning against cyber-attacks (Arora, Bhatia, 2021: 28-48). The dawns of biometric security technologies with the introduction of innovative authentication but also identification programs have pushed forwards the discussions over security and privacy with a straightforward focus over conceptualization details (van der Ploeg, 2003: 85–104).

The use of biometric security in authentication has also been discussed with focus on implications, predictions and perceptions over governmental policy options (Seyal, Turner, 2012: 1242–1256). The efficiency of different solutions for the use of biometric passports and e-passports has also been discussed (Choudhury, Rabbani, 2019: 199–229). Also, in essential economic fields such as finances and banks, breaches to cyber-security have brought into discussion legislative options of increasing authentication security, thus focusing on the factors and perceptions for the effectiveness and outcomes of such measures (Laux, Luse, Mennecke, Townsend, 2011: 221–245). It is further argued that biometrics increases security of online transactions, still researchers inquire on the manner in which markets respond to such measures (Kleist, 2007: 319-329).

Various biometric solutions are the target of academic research, comparisons including unimodal biometric versus multimodal fusion biometric frameworks (Bala, Gupta, Kumar, 2021: 289–337). Different approaches against falsifying authentication procedures are also discussed in terms of effects and outcomes, roles in the process for governments and legislatures, scope of actions and regulations, and acts of the falsifier (Grünenberg, 2020: 223–240). Cyber security concerns have also been elevated to the Internet of Things (IoT) to apply new biometric authentication systems instead of traditional text password (Meena, Choudhary, 2019: 643–652).

### **Research methodology**

The research uses the Google Ngram Viewer collection technique, which is a graphical tool for analyzing and interpreting the frequencies of use of words or phrases of words associated with them in the period selected for analysis. The selected, collected and extracted data set is categorized for analysis by entering the search options for a word, phrase or expression and analyzing the frequencies of occurrences, that is, the number of times the respective word or phrase was used in the selected period.

The topic repertoire is based on text search in English and is intended to highlight the most important dependencies of the use of topics in the selected data interval.

Data exploration highlights the relative frequency of their use over time, reflecting the semantic characteristics of the selected words and phrases by reporting to the following typology of investigation depending on the value that  $\langle n \rangle$  can take:  $n=1$  (unigram);  $n=2$  (bigram);  $n=3$  (trigram);  $n=4$  (quadgram);  $n$  (ngram).

To select over twenty topics and other expressions relevant to the field of digital security governance and biometrics analysis, we will use the semantic and terminological features provided by the International Organization for Standardization (ISO/IEC 2382-37:2022, Information technology — Vocabulary Part 37: Biometrics, 3rd edition), as well as reference sources from the World Bank (data retrieved March 2025), as well (Practitioner's Guide) on the specific research areas of biometric identification, legal and digital identity, privacy and personal data (World Bank, 2025).

The research results reflect thirteen distinct figures as a result of frequency representations and graphical visualization as follows: 1) topics according to data types: digital age, information age, data governance, government data, e-governance; 2) topics according to the category of personal data and informational support: genetic data, biometric data, personal data, personal information, sensitive information; 3) topics in the category of biometric data and biological data (including biological properties, psychological characteristics): data privacy, facial recognition, fingerprint, DNA samples; 4) topics in the category of identification and recognition on digital support: digital identification, information privacy, biometric technologies, data protection, individual authentication; 5) results of the wildcard search (\*) according to the terminological and semantic variables in a phrase such as wildcard search for biometric concept; 6) results of the wildcard search (\*) according to the conceptual associations of a topic such as wildcard search for conceptual associations with biometric concept; 7) identifying the most frequent and common expressions and studying the semantic and linguistic variability of a term in the lexical field of a concept such as: biometric verification, biometric characteristics, biometric recognition, biometric sensor, biometric verification; 8) identifying and analyzing the frequencies of appearance and use in the digitalized literature of topics in the lexical field of authentication technologies intended to identify a person based on biometric traits namely: voice biometric, physiological biometric, behavioral biometrics; 9) identifying and analyzing the frequencies of appearance and use of health data intended to provide information related to the health status of a person namely: wild card search for concepts associated with health \* data. This type of data selected for analysis is based on the extraction of data used by the digitalized literature relating to a wider and more complex range of types of health data such as: clinical data, genetic data and personal data of the patient, data and information related to the use and utilization of medical devices.

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## Results and findings

The interest in biometric systems and biometric data security has developed rather recently, proof for this statement residing in the outcomes of online searches and the presence in the scientific literature. Thus, the following graphical representations outline the results of searches on Google Ngram Viewer platform for concepts and associations of concepts occurrences in the online digitized literature.

The first word search has been centered around *digital age*, *information age*, *data governance*, *government data* and *e-governance*. We noticed that except for “information age” (which recorded its highest occurrence value in 1998) all concepts peaked towards 2022, the prevailing concept in the search group being “digital age”.

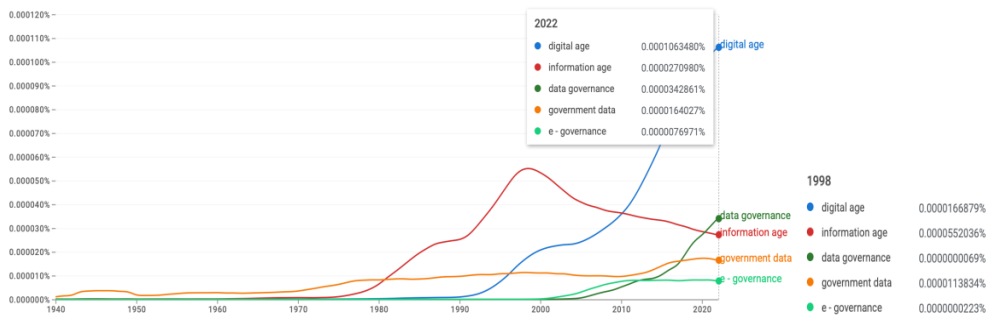


Figure 1. Ngram search for digital age, information age, data governance, government data, e-governance conceptual cluster

The second search evolved around the cluster of sensitive information and data: *genetic data*, *biometric data*, *personal data*, *personal information*, *sensitive information*. We noticed the growing rate of occurrences after 1970 towards the end of the monitoring period, especially for the concepts “personal data” and “personal information”, which formed a huge interest for the literature, for regulatory bodies and regulation options.

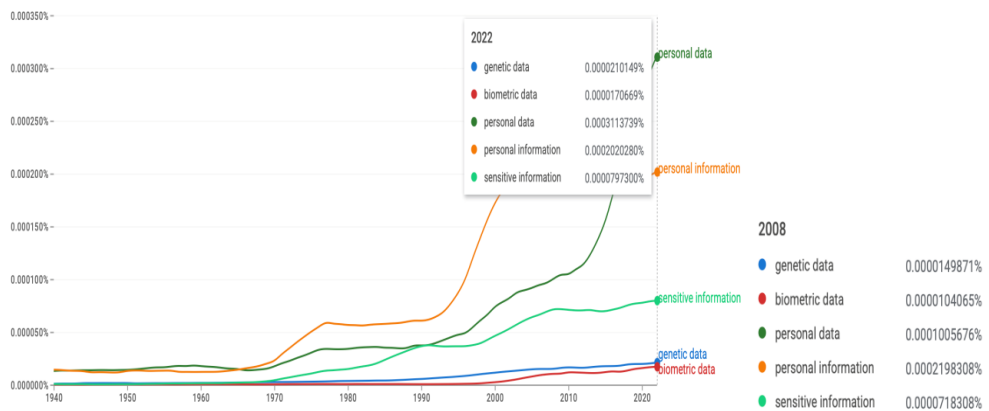


Figure 2. Ngram search for genetic data, biometric data, personal data, personal information, sensitive information conceptual cluster.

Further, we introduced in the *ngram* search data engine the concepts *data privacy*, *facial recognition*, *fingerprint* and *DNA samples*. Based on the *ngrams* returned, we

observed a higher interest around DNA discussions around 2008, while facial recognition and data privacy show a steep increase between 2010-2022.

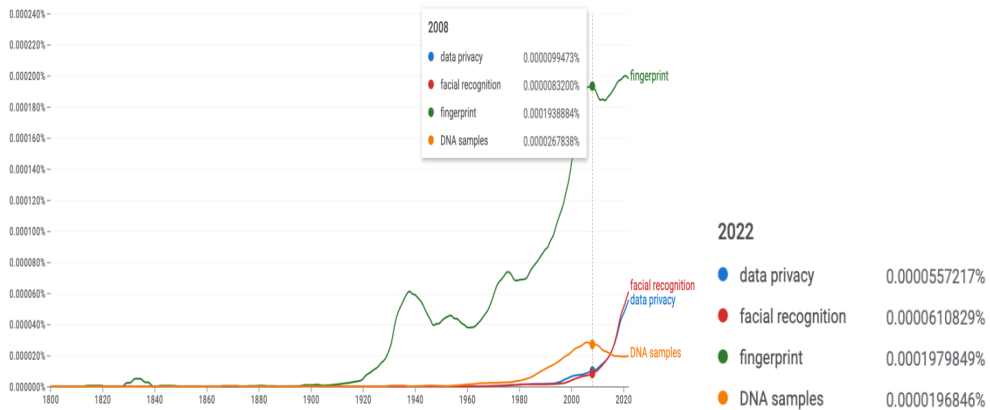


Figure 3. Ngram search for data privacy, facial recognition, fingerprint, DNA samples

Moreover, the data search for *digital identification, information privacy, biometric technologies, data protection, individual authentication* returned a representation of concept occurrences which makes obvious the literature interest for information privacy and especially for data protection.

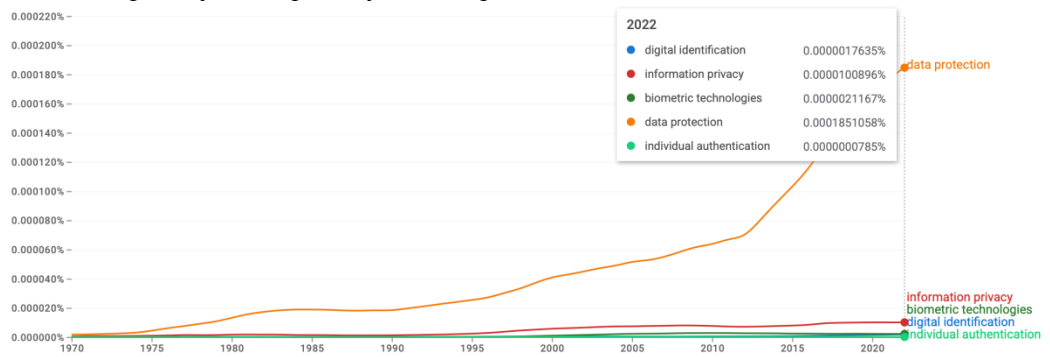


Figure 4. Ngram search for digital identification, information privacy, biometric technologies, data protection, individual authentication

The next stage was the analysis of returns following the wildcard search for conceptual associations around biometric adjective: biometric data, biometric system(s), biometric identification, biometric authentication, biometric information, biometric technology(ies), and biometric identifiers. These associations appear to have increased their occurrences in general at the end of 90s, reaching a peak around 2010. Biometric data continued its ascension towards 2022.



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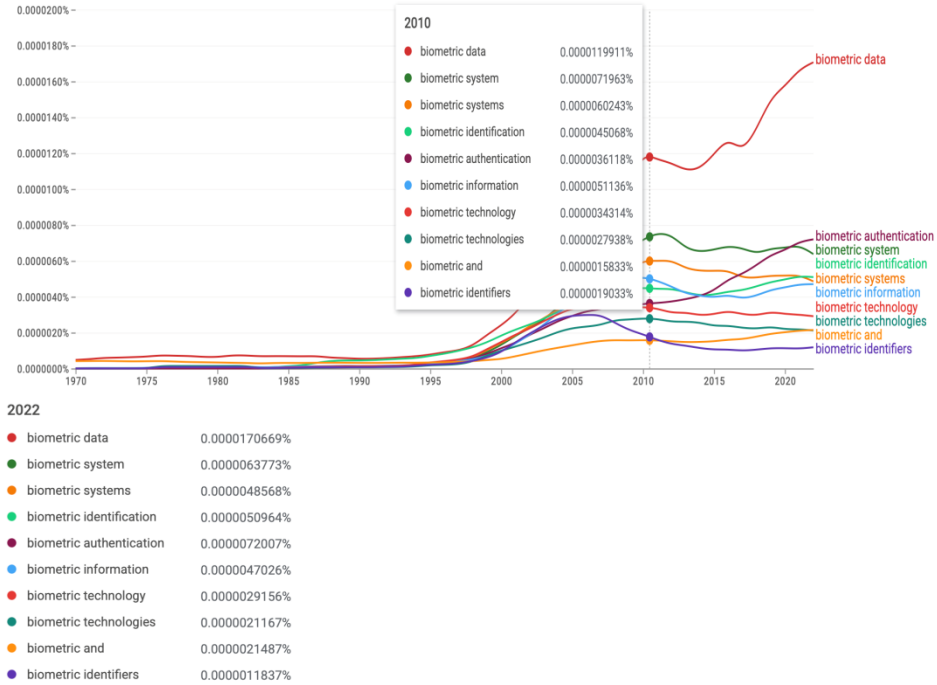


Figure 5. Wildcard search for biometric concept

Another wildcard search around the same concept aimed at identifying the most frequent online occurrences returned the associations of the concept biometric with the following terms: biographic, demographic, genetic, document, epidemiologic, statistical, and biographical.

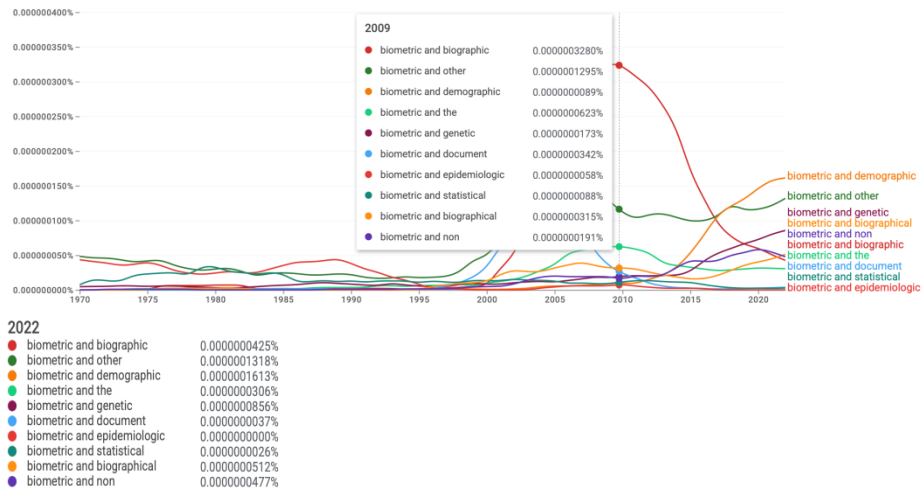


Figure 6. Wildcard search for conceptual associations with biometric concept

The following search targeted the associations *biometric verification*, *biometric characteristics*, *biometric recognition*, *biometric sensor*, *biometric verification* in order to infer on the trends and values of occurrences monitored until 2022.

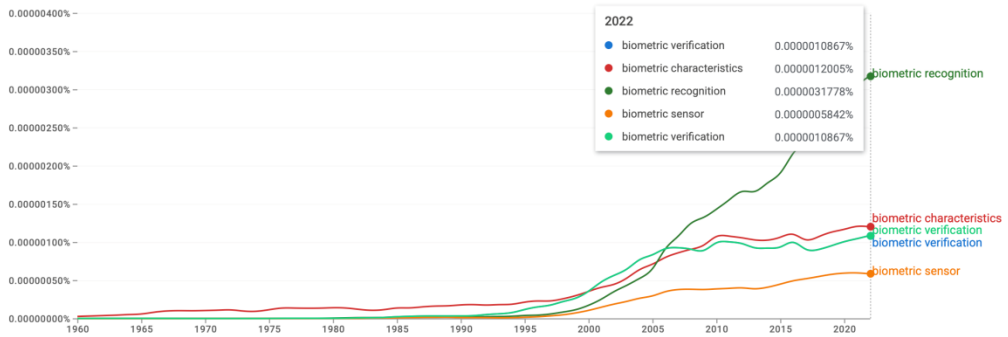


Figure 7. Occurrence of concepts: biometric verification, biometric characteristics, biometric recognition, biometric sensor, biometric verification

Also, the search retrieved the following conceptual associations voice biometric, physiological biometric, behavioural biometrics, which boost their presence in the online literature following 2000s.

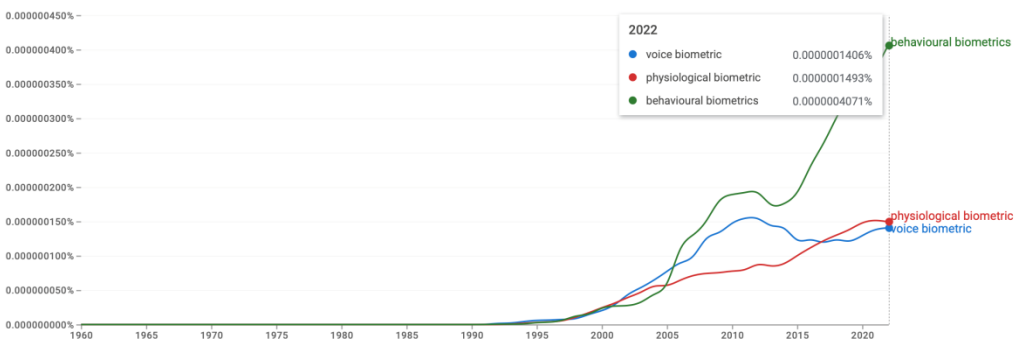


Figure 8. Occurrence of concepts: voice biometric, physiological biometric, behavioral biometrics

Aimed at identifying the manner in which essential and sensitive societal fields such as healthcare are associated to data, we accomplished a wildcard search for concepts associated to both health and data which returned the following *ngrams*: health care data, health effects data, health status data, health insurance data, health survey data, health surveillance data, health manpower data, health services data, health record data, health related data.

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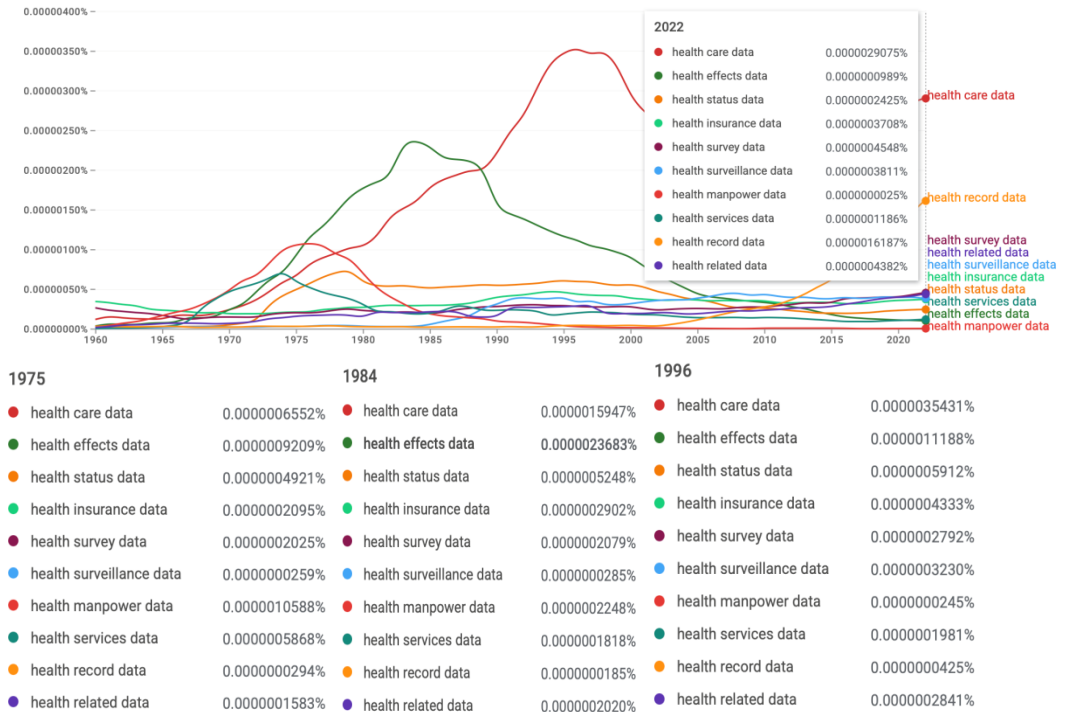


Figure 9. Wild card search for concepts associated to health \* data

Further, the research consisted in applying the search and extract the values for behavioral characteristics, biometric characteristics, biological characteristics associations referring to their appearance in the digitized literature. The data resulted shows a different onset for biological characteristics versus behavioral and biometric characteristics.

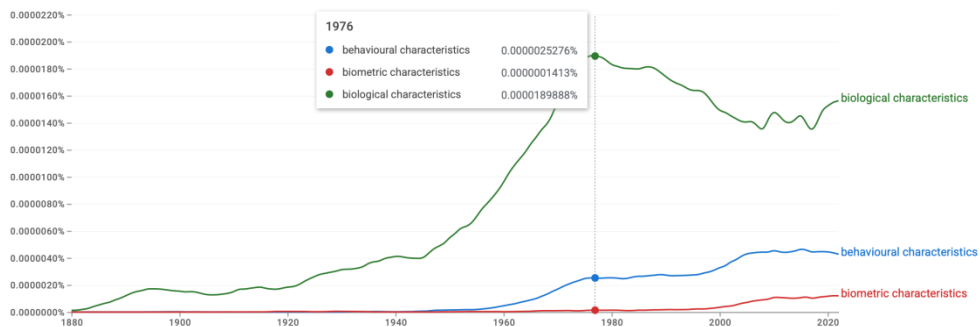


Figure 10. Occurrence of concepts: behavioral characteristics, biometric characteristics, biological characteristics

The next step consisted in identifying the values of concept occurrence for specific concepts biometric capture, biometric recognition system, biometric verification system defined by the International Organization for Standardization (ISO/IEC 2382-37:2022). Consequently, we observed the usage trend after 2000 in line with industry developments.

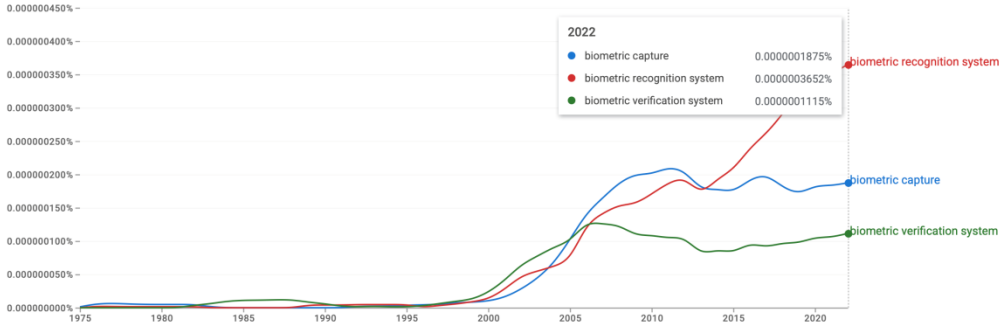


Figure 11. Occurrence of concepts: biometric capture, biometric recognition system, biometric verification system

More, the wildcard search for associations with multibiometric concept – multibiometric system(s) and multibiometric fusion – defined by the International Organization for Standardization (ISO/IEC 2382-37:2022) which revealed their appearance and increase in use after 2000 with a peak in 2009.

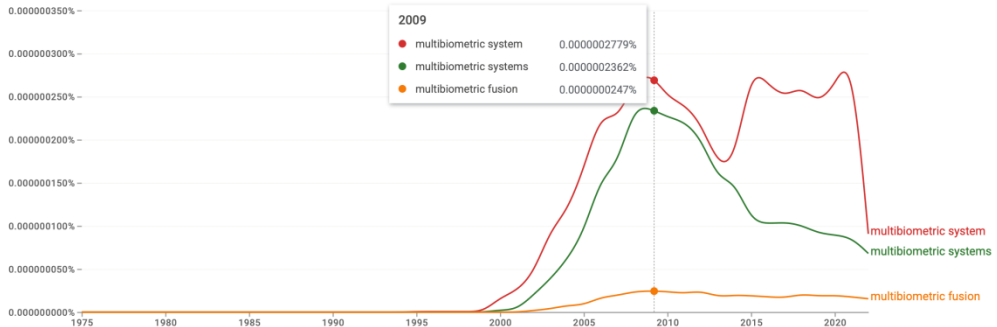


Figure 12. Wildcard search for multibiometric \* concept

On the same note, the wildcard search for associations with multimodal concept traced the following: multimodal transport, multimodal approach, multimodal texts, multimodal therapy, multimodal interaction, multimodal data and multimodal analysis. The graphical representation and retrieved values shows the latest import of multimodal concept to the use of data, analysis of texts in a later stage following 2000s.

## Theorizing Digital Security Governance and Biometric Data Inputs based on Research Topics and Online Mentions Tracking

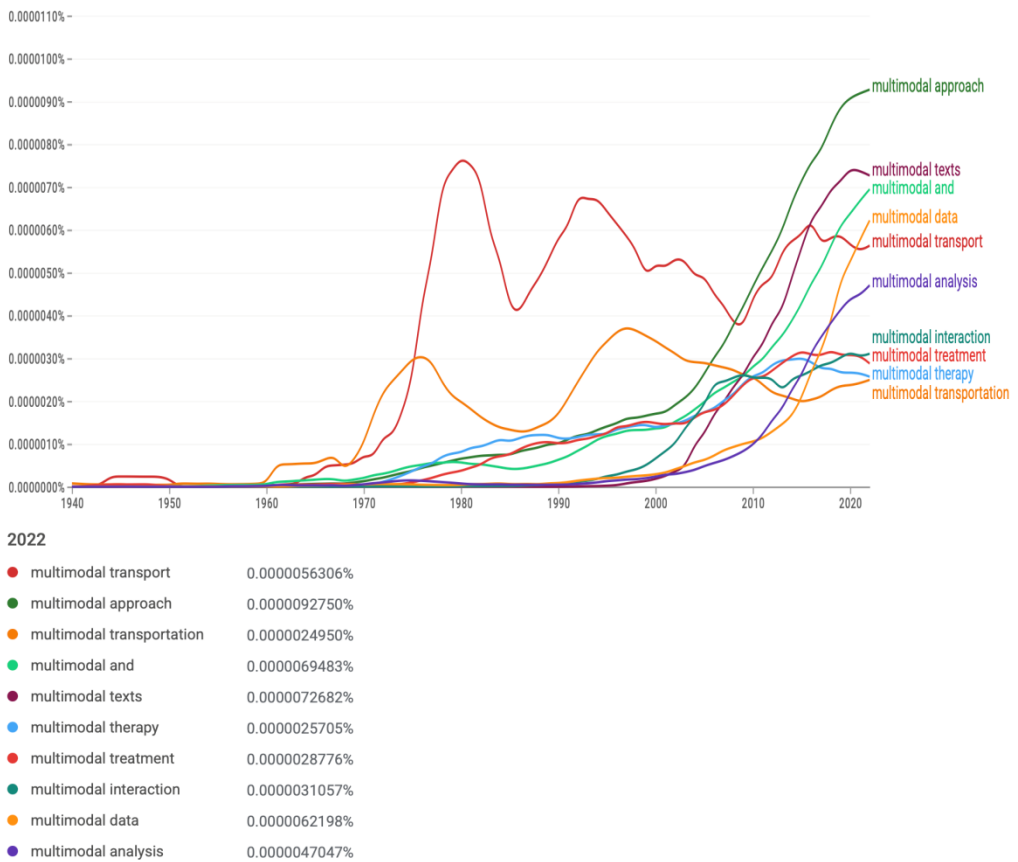


Figure 13. Wildcard search for multimodal \* concept

### Conclusions

This study contributes to the identification and answer to some questions in the field of research knowledge. First of all, the results identified based on the visualization of the figures highlight an ascending trend of the use of relevant topics since 1970 (Figure 3, Figure 4, Figure 5, Figure 6, Figure 7, Figure 8 and Figure 9). The study also differentiates the most important categories of topics and contributes to the identification and nomination of important sequential analysis categories for future research in the field of identity management, data access and protection, security protocols and security in various environments (Figure 1 and Figure 9). Furthermore, the study reveals new directions of personal and biometric data management, such as the field of operational security, by monitoring the constantly ascending trends of the use of key concepts, as well as the need to configure legal regulation policies, protection and risk assessment and planning of responses in case of cyber incidents.

The results have shown the wide interest in the emergence of new solutions to secure digital data and online transactions against cyber-attacks and intrusions, increasing authentication security, different options involving biometrics use in these processes and respecting privacy, personal data and sensitive information (Figures 10, 11, 12 and 13).

### Authors' Contributions:

The authors contributed equally to this work.

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## ORIGINAL PAPER

# Embedding Human Emotional Intelligence in Artificial Intelligence for Educational Benefits

Adrian-Florin Bușu<sup>1)</sup>

### Abstract:

This paper explores the integration of human Emotional Intelligence (EI) into Artificial Intelligence (AI) systems to enhance educational experiences. By embedding EI in AI, artificial systems can understand better and respond more accurately to the emotional states of students, fostering more personalized, empathetic and effective learning environments. Emotional AI can support students' emotional well-being, improve engagement and facilitate tailored learning experiences by recognizing and adapting to emotional cues such as frustration, excitement or stress. Additionally, it enables early identification of emotional or academic challenges, promoting timely interventions. We will examine the potential benefits of Emotional AI in education, including improved teacher-student interactions, enhanced mental health support and more inclusive learning environments. Potential threats such as manipulation or emotional dependency are also tackled in this paper, in order to ensure the responsible use of Emotional AI in educational contexts.

**Keywords:** *Emotional AI, tailored learning, integration, challenge, benefits*

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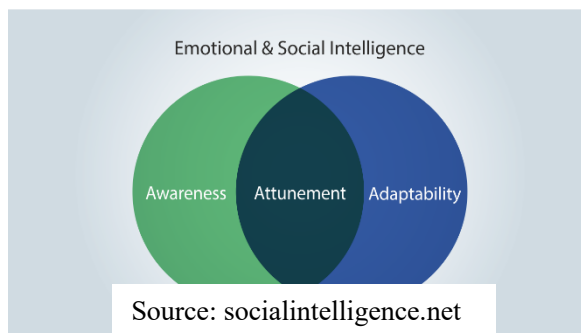
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## Introduction

The fusion of Emotional Intelligence (EI) and Artificial Intelligence (AI), commonly known as Emotional AI or Affective Computing, holds transformative potential across various fields, from healthcare and customer service to entertainment and education. Emotional AI seeks to empower machines not only to comprehend human emotions but also to respond in socially and contextually appropriate ways. By integrating EI into AI systems, we can create technologies that facilitate communication and collaboration that closely resemble human emotional interactions. Emotional Intelligence encompasses the ability to perceive, understand, manage and regulate emotions in oneself and others (Dhani & Sharma, 2016; Buşu, 2020). Emotional Intelligence is fundamental to human intelligence, influencing interpersonal relationships, decision-making, empathy and social skills, all of which are essential elements for effective interactions. Traditionally regarded as a hallmark of human cognition, distinct from the logical, problem-solving skills of Artificial Intelligence, Emotional Intelligence's role is gaining renewed focus as we advance AI capabilities. By merging EI with AI, we enhance the richness of human-machine interactions, cultivating empathetic systems that can improve decision-making and foster collaboration, ultimately benefiting society as a whole. This discussion will delve into the core components of EI, explore the challenges of replicating it in machines, review the current landscape of Emotional AI research, highlight promising applications - especially in education - and address potential risks associated with the development of emotionally intelligent machines.

## Defining Concepts: Emotional Intelligence, Artificial Intelligence and Emotional AI

**1. Emotional Intelligence (EI)** represents the capacity to recognize, comprehend and manage one's own emotions while simultaneously discerning and responding appropriately to the emotions of others. The construct integrates two principal components: emotion and intelligence, both of which necessitate precise conceptual delineation. Psychologists have posited various definitions of emotion, yet a widely accepted perspective regards emotions as psycho-physiological responses to environmental stimuli (Gerrig & Zimbardo, 2002: 4). Keltner, Oatley and Jenkins (2013: 27) characterize emotions as “multifaceted responses to events that we perceive as challenges or opportunities in our inner or outer world, events that are important to our goals, particularly our social goals.” Intelligence, conversely, encompasses advanced cognitive functions such as problem-solving, reasoning, learning and comprehension. Intelligence is defined as “the ability to understand complex ideas, adapt effectively to the environment, learn from experience, engage in various forms of reasoning and overcome



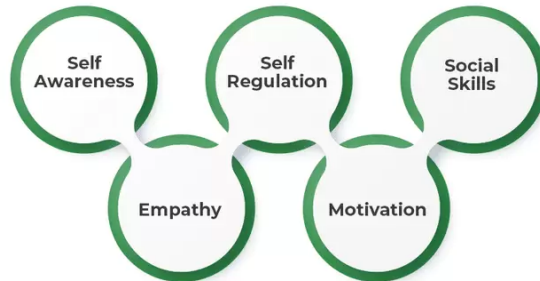
## **Embedding Human Emotional Intelligence in Artificial Intelligence for Educational Benefits**

obstacles through thought.” (Neisser et al., 1996: 1) Empirical research on EI suggests a strong correlation between self-regulation and the capacity to interpret and predict the behaviors of others, highlighting the pivotal role of non-cognitive faculties in human intelligence. EI facilitates the development of interpersonal competencies, fostering more adaptive responses in cognitive and social interactions. Moreover, a profound interconnection exists between Emotional Intelligence (EI) and Social Intelligence (SI). Wechsler (1940: 116) argued that general intelligence encompasses both intellectual and non-intellectual determinants. The latter category includes personality traits that exert a substantial impact on individual success, complementing conventional cognitive abilities. He further asserted that non-intellectual components - comprising both cognitive and affective faculties - exert a formative influence on human behavior, encapsulated under the domain of “social intelligence”. Expanding on this framework, Gardner (1983: 88) distinguished between intrapersonal and interpersonal intelligence, two constructs that emphasize introspection and communicative efficacy, respectively. His notion of “intrapersonal intelligence”, defined as “the ability to utilize, comprehend and regulate one's emotions”, closely parallels the tenets of EI, underscoring the importance of self-analysis in emotional modulation and behavioral adaptation. In summation, EI constitutes an essential dimension of human intelligence, integrating cognitive and affective competencies. Its significance extends to fostering interpersonal efficacy, emotional self-regulation and enhanced adaptability across diverse social and professional contexts.

A critical aspect of the research on Emotional Intelligence is understanding how emotions influence reasoning and whether reasoning about emotions can be considered a form of intelligence (Salovey, Brackett & Mayer, 2004:74). Reflecting on these ideas, Mayer, Salovey and Caruso (2004: 197) updated their definition of Emotional Intelligence, describing it as “the capacity to reason about emotions and of emotions, to enhance thinking. It includes the abilities to accurately perceive emotions, to access and generate emotions to assist thought, to understand emotions and emotional knowledge and to reflectively regulate emotions to promote emotional and intellectual growth”. Consequently, demonstrating appropriate emotions in particular situations requires advanced intellectual skills that allow individuals to analyze, process and evaluate circumstances effectively. Notably, Emotional Intelligence emphasizes the interaction between emotion and intelligence, helping to understand how these two components of human cognition influence one another. Daniel Goleman (1996: 68), a key figure in the popularization of EI, identifies five essential components of Emotional Intelligence:

1. **Self-awareness:** The ability to recognize and understand one's own emotions, thoughts and behaviors, and how they influence others.
2. **Self-regulation:** The ability to manage or redirect disruptive emotions and impulses in healthy ways.
3. **Motivation:** The drive to achieve for the sake of personal fulfillment and goal achievement.
4. **Empathy:** The ability to understand and share the feelings of others, which is essential for effective social interactions.
5. **Social skills:** The capacity to manage relationships and navigate social networks.

## EMOTIONAL INTELLIGENCE



Source: <https://dataexpertise.in/advancing-emotional-artificial-intelligence/>

### 2. Artificial Intelligence (AI)

John McCarthy, one of the pioneers of AI, presented the first definition of Artificial Intelligence at a conference on the campus of Dartmouth in the summer of 1956: *The goal of AI is to develop machines that behave as though they were intelligent.* Since then, scientists and researchers, scholars and theoreticians have struggled to come up with a more complex definition of AI. The result is that nowadays there are so many attempts to define the concept of Artificial Intelligence, that offering a simple and robust answer becomes quite problematic. Basically, AI refers to systems or machines that can perform tasks that typically require human intelligence. These tasks include problem-solving, learning, pattern recognition and decision-making. AI can be broadly classified into two categories:

1. **Narrow AI:** AI systems designed to perform a specific task, such as image recognition, natural language processing (NLP) or playing chess. These systems are highly specialized, but do not possess general intelligence or the ability to understand emotions.
2. **General AI (AGI):** A more advanced form of AI that has the potential to understand and perform any intellectual task that a human can. While AGI is still in its theoretical stage, it is a key goal in AI research, with aspirations of replicating human-like cognitive processes, including emotional understanding.

The concept of Artificial Intelligence has rapidly evolved from a theoretical idea into a tangible, functional reality. Early AI models, primarily based on logical reasoning and rule-based systems, have now given way to more advanced learning algorithms, including machine learning and deep learning, which enable machines to perform complex tasks. However, the development of AI has focused primarily on cognitive abilities, such as processing data, making predictions and solving problems.

### 3. Emotional AI (Affective Computing)

One critical aspect of human intelligence that has not been fully replicated in machines and which is becoming increasingly vital for the future of AI is Emotional Intelligence. Emotional AI or Affective Computing is an interdisciplinary field that focuses on the development of systems and devices that can recognize, interpret and simulate human emotions (Fleckenstein, 1991: 447). Since the introduction of the concept of Affective Computing (Piccard, 2000), it has been instrumental in enabling computers to recognize and express emotions, as well as respond intelligently to human emotions (Piccard, Vyzas & Healey, 2001). Affective Computing or Emotional AI is a concept that deals with human emotions, feelings, emotion recognition and sentiment analysis. It

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combines insights from psychology, neuroscience, machine learning and computational modeling. Emotional AI is the application of Emotional Intelligence to AI systems, enabling machines to interact with humans in a more empathetic, adaptive and socially-aware manner.

### **The Challenges of Embedding Emotional Intelligence in Artificial Intelligence**

Emotional Intelligence is a fundamental aspect of human cognition; however, embedding it within Artificial Intelligence (AI) systems presents significant challenges. These challenges arise from both the technological limitations of current AI frameworks and the inherent complexity of human emotions (Velagaleti et al., 2024). Several critical difficulties can be identified, some of which require substantial effort to overcome.

One of the primary challenges is the computational modeling of emotions. Human emotions are highly intricate and influenced by a multitude of factors, including past experiences, social contexts and individual personality traits. Capturing this complexity within an AI system requires the development of sophisticated models capable of accurately processing and responding to emotional data. Unlike cognitive tasks, which can often be deconstructed into discrete logical steps, emotions are fluid, subjective and multifaceted. Furthermore, emotional expressions are frequently context-dependent, requiring a nuanced understanding of human psychology, which remains difficult to replicate computationally. Emotional responses also vary significantly across cultural, social and environmental contexts, necessitating AI systems that can adapt to these variations to ensure appropriate and contextually relevant responses.

A second major challenge concerns Natural Language Processing (NLP) and the expression of emotions. Effective Emotional Intelligence involves not only recognizing emotions, but also communicating them appropriately. NLP serves as a foundational technology for enabling AI systems to interact with humans through language (Chowdhary & Chowdhary, 2020). However, existing NLP models primarily focus on analyzing surface-level meaning rather than deciphering underlying emotional tones. While advancements in sentiment analysis have enhanced AI's ability to detect emotions in text, current models still struggle to interpret complex emotional expressions, including sarcasm, humor and subtle linguistic nuances - elements that are essential for effective emotional communication. Moreover, generating emotionally congruent responses remains a significant obstacle, as AI systems must align their outputs with both the explicit and implicit emotional context of a given interaction.

Another critical issue is the interpretation of nonverbal cues, including facial expressions, body language and vocal intonations. Affective Computing has sought to address this challenge by integrating facial recognition and voice analysis technologies in order to enhance AI's ability to interpret human emotions. However, the accuracy and reliability of these systems remain limited. While facial recognition technology can identify basic emotions such as happiness, sadness, anger and surprise, it struggles to detect more nuanced emotional states and complex affective combinations. Additionally, cultural variations in emotional expression present further challenges. For instance, while head-shaking is commonly associated with negation in many cultures, in countries such as Bulgaria, as well as certain regions of Greece, Iran, Lebanon, Turkey and Egypt, the same gesture may indicate agreement. Such variations necessitate AI systems that can adapt to cultural specificities so that misinterpretations are avoided.

Beyond technical limitations, the ethical and moral implications of emotionally intelligent AI warrant critical consideration. The simulation of empathy and other affective responses by AI raises concerns regarding the potential for manipulation. If AI systems are designed to elicit emotional engagement, there is a risk that they could be exploited for deceptive or coercive purposes, particularly in sensitive domains such as healthcare, education and marketing. The distinction between genuine Emotional Intelligence and mere emotional manipulation thus becomes increasingly blurred, necessitating robust ethical frameworks to govern the development and deployment of such technologies.

Whereas the integration of Emotional Intelligence into Artificial Intelligence holds significant promise, it remains a formidable challenge due to the complexity of emotional modeling, the limitations of NLP and nonverbal cue interpretation and the ethical concerns surrounding affective AI. Addressing these challenges will require interdisciplinary collaboration, combining insights from psychology, linguistics, computer science and ethics to develop AI systems that can process and respond to human emotions in a manner that is both accurate and ethically responsible.

### **Approaches to Embedding Emotional Intelligence in Artificial Intelligence**

To address the challenges associated with integrating Emotional Intelligence (EI) into Artificial Intelligence (AI) systems, several approaches have been proposed, leveraging advancements in machine learning, psychology, neuroscience and Affective Computing (Schuller & Schuller, 2018; Vistorte et al., 2024). These approaches aim to enhance AI's ability to recognize, interpret and respond to human emotions in a manner that is both accurate and contextually appropriate.

Affective Computing represents a foundational area of research in this domain, focusing on the development of systems capable of processing emotional information. This interdisciplinary field integrates technologies such as facial recognition, speech analysis and physiological monitoring to detect and interpret emotional states. For example, AI can analyze facial expressions to infer emotions or assess vocal modulation patterns to determine a speaker's affective state. Beyond emotion recognition, Affective Computing also explores the production of contextually appropriate responses. AI systems equipped with such capabilities can, for instance, detect signs of frustration or sadness in a user's voice and respond with empathetic dialogue or supportive actions, thereby simulating human-like emotional engagement.

Another significant approach involves the application of deep learning techniques, particularly convolutional neural networks (CNNs) and recurrent neural networks (RNNs), which have demonstrated efficacy in recognizing complex patterns within emotional data (Vu et al., 2016). These models are trained on extensive datasets of verbal and nonverbal emotional expressions, enabling AI to interpret a broad spectrum of affective cues. Recent advancements in multimodal emotion recognition further enhance AI's emotional understanding by integrating data from multiple sources - such as facial expressions, vocal tone and body language - resulting in a more holistic and contextually nuanced emotional response.

A critical aspect of embedding EI into AI is the simulation of empathy and social skills. One of the primary objectives of emotionally intelligent AI is to replicate empathic behaviors by not only recognizing an individual's emotional state but also responding in a manner that conveys understanding and support. Empathy in AI can be simulated through adaptive dialogue systems, where responses are modulated based on the detected

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emotional context of the user. Additionally, AI can be trained in social skills such as conflict resolution and negotiation by analyzing large-scale social interaction data. Through machine learning algorithms, AI systems can identify patterns in human interactions and generate strategies for managing complex social dynamics, thereby enabling them to navigate sensitive conversations or mediate disputes effectively.

The integration of psychological and neuroscientific principles represents another promising avenue for enhancing AI's emotional intelligence. Insights from psychology, particularly theories of emotional processing, can inform the development of AI models that align more closely with human affective experiences. For example, the Emotional Intelligence framework proposed by Goleman (1996) emphasizes self-awareness, self-regulation and social skills as fundamental components of EI. Incorporating such principles into AI design can provide a theoretical foundation for developing more emotionally responsive systems. Furthermore, advancements in neurofeedback and brain-computer interfaces (Mudgal et al., 2020:56) may enable AI to interact with human emotional states in real-time, fostering more intuitive and adaptive human-computer interactions.

In summary, the integration of Emotional Intelligence into AI requires a multifaceted approach that combines Affective Computing, deep learning techniques, empathy simulation and insights from psychology and neuroscience. While significant progress has been made, further interdisciplinary research is necessary to develop AI systems capable of accurately interpreting and responding to the complexities of human emotions.

### Applications of Emotional AI

The integration of Emotional Intelligence into Artificial Intelligence holds immense potential across various industries and fields. Some of the key applications may include:

1. **Healthcare and Therapy:** Emotional AI can play a transformative role in healthcare by providing personalized care and support. AI systems could be used to monitor patients' emotional states and offer appropriate interventions, particularly for individuals with mental health conditions such as depression, anxiety or autism spectrum disorders. AI-powered virtual therapists or chatbots could provide emotional support, making mental health resources more accessible.



Source: demaerre/iStock.com

2. **Customer Service:** Emotional AI has the potential to revolutionize customer service by enabling AI chatbots and virtual assistants to respond empathetically to customer concerns. By recognizing frustration, confusion or anger in a customer's voice or text, AI systems can adjust their tone and responses to create a more positive experience.

3. **Social Companionship:** Emotional AI can also be applied in the creation of social robots and virtual companions (see CompanionAble, EmotiRob or Paro robots). These systems could provide emotional support to elderly individuals, people with disabilities or those living in social isolation. By simulating empathy and understanding, emotionally intelligent AI could help alleviate loneliness and enhance the well-being of vulnerable populations.

4. **Education:** Emotionally intelligent AI could be used to monitor students' emotional engagement and provide tailored support. For example, AI could detect when a student is feeling overwhelmed or disengaged and adjust the learning materials or interaction style to improve motivation and learning outcomes.

### **Educational Benefits of Emotional AI**

The integration of Emotional Artificial Intelligence (EAI) into educational contexts presents significant opportunities for enhancing both the learning experience and broader educational processes (Molero et al., 2020). Key benefits of EAI include providing emotional support, personalizing learning experiences and fostering greater student engagement. A particularly noteworthy advantage of EAI is its capacity to personalize learning by adapting educational content and pedagogical approaches to meet the diverse emotional and cognitive needs of individual students. By detecting emotional cues such as frustration, boredom or enthusiasm, EAI systems can dynamically adjust the pacing, complexity and nature of instructional material, aligning more closely with the student's emotional state and learning preferences.

Another notable benefit of EAI is its potential to increase student engagement. By monitoring emotional signals during lessons or activities, EAI can identify when students disengage or lose focus, prompting the system to employ strategies such as gamification, positive reinforcement or interactive content to regain students' attention and re-engage them in the learning process. Virtual tutors or interactive classroom assistants equipped with empathetic response capabilities can also contribute to a more socially engaging and enjoyable learning environment, cultivating a sense of connection and emotional support. Moreover, EAI may facilitate the development of empathy among students by providing simulated interactions in which they can practice recognizing and responding to emotional cues, thereby enhancing their social and interpersonal competencies.

Additional advantages of EAI in education include the early detection of emotional and learning difficulties. Through the identification of early indicators of emotional distress, learning challenges or mental health concerns, EAI systems can facilitate timely and targeted interventions. Furthermore, EAI holds the potential to enhance teacher-student relationships by fostering a more empathetic and supportive learning environment. Other benefits include improvements in feedback and performance tracking, the facilitation of remote learning, the promotion of mental health awareness, the creation of inclusive educational settings and the encouragement of collaborative learning (Bărbuceanu, 2020).

The application of Emotional AI in education holds significant promise for advancing both the academic and emotional development of students. By fostering a more personalized, empathetic and supportive educational environment, EAI can help students feel more engaged, understood and equipped to achieve their educational objectives. As technological advancements continue, it is likely that Emotional AI will further reshape educational paradigms, making them more responsive to students' emotional and social



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needs while enhancing cognitive outcomes. However, it is imperative that the implementation of Emotional AI is governed by ethical principles, ensuring respect for privacy and safeguarding the irreplaceable human elements that are fundamental to education.

The development of Emotional AI raises profound ethical considerations that must be addressed as the technology advances. A critical ethical issue pertains to the potential for manipulation. Given the ability of AI systems to accurately interpret and respond to human emotions, there is an inherent risk that such systems could be exploited for commercial, political or other unethical purposes (Ienca, 2023:24). To mitigate this risk, it is essential that EAI technologies are designed and deployed with transparency, fairness and accountability. Furthermore, the advent of emotionally intelligent machines introduces concerns related to emotional dependency. If individuals form attachments to AI systems that simulate empathy, there is a risk of over-reliance on technology for emotional support (Zhai, Wibowo, & Li, 2024:10), potentially leading to social isolation and a diminished capacity for authentic human interaction.

Finally, the issue of inequality warrants attention, as Emotional AI, like other AI technologies, may perpetuate existing biases. If the data used to train EAI systems is biased, the systems' emotional recognition and responses may reflect these biases, resulting in inequitable outcomes. To address this challenge, it is extremely important that EAI systems be developed using diverse datasets to minimize bias and promote fairness, ensuring that their deployment fosters equitable and inclusive educational environments.

### **All things considered...**

Embedding human Emotional Intelligence in Artificial Intelligence is an ambitious and complex endeavor that promises to revolutionize the way we interact with machines. By developing AI systems that recognize, understand and respond to emotions, we can create more empathetic, intuitive and effective machines that can enhance human experiences across various domains. However, the journey to creating emotionally intelligent AI is fraught with challenges, including technical limitations, ethical concerns and the complexity of human emotions themselves. Despite these challenges, the ongoing research in affective computing, deep learning and psychological modeling provides promising pathways toward achieving emotionally intelligent AI. As this technology continues to evolve, it is essential that we balance innovation with responsibility. By considering the ethical implications of Emotional AI and ensuring that it is developed with fairness, transparency and respect for human well-being, we can harness its potential to create a future where humans and machines can interact in emotionally intelligent and meaningful ways. The intertwining of Emotional Intelligence and Artificial Intelligence has the potential to profoundly reshape human-AI interactions. By equipping AI systems with the ability to recognize, interpret and respond to human emotions, we might be able to create machines that are not only functional but also empathetic and socially aware. This integration can enhance communication, foster collaboration and provide emotional support across various realms, especially in the domain of education, where it can prove truly beneficial for the progress of students and other learners. By carefully balancing innovation with ethical responsibility, we can ensure that the fusion of Emotional Intelligence and Artificial Intelligence leads to a future where humans and machines work together in harmony to enhance well-being and societal progress.

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## ORIGINAL PAPER

# Modeling Volatility Spillovers across emerging and developed stock markets using GARCH models: An empirical case study on the USA and Romania

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### Abstract:

The main aim of this research paper is to investigate volatility spillovers across emerging and developed stock markets using GARCH models based on an empirical case study on the USA and Romania. The financial econometric approach is based on a relevant sample data that covers the time period from February 2019 to January 2025 which includes the impact of recent extreme events such as the COVID-19 pandemic or the war between Russia and Ukraine. This research study contributes to the expansion of the literature by obtaining relevant empirical results regarding the behavior of emerging and developed stock markets.

**Keywords:** *GARCH models, heteroscedasticity, emerging stock market, developed stock market, volatility*

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# **Modeling Volatility Spillovers across emerging and developed stock markets using GARCH models: An empirical case study on the USA and Romania**

## **Introduction**

Financial markets are inherently volatile, influenced by macroeconomic conditions, investor sentiment, and geopolitical events. Understanding and quantifying volatility is crucial for investors, policymakers, and financial analysts, as it provides insights into risk levels and potential investment opportunities. While developed markets, such as the United States' S&P 500 stock market index, are characterized by high liquidity and regulatory stability, emerging markets, like Romania's Bucharest Stock Exchange (BSE), often exhibit higher volatility due to economic fluctuations, lower trading volumes, and evolving market structures. This study aims to provide a comparative volatility analysis between these two distinct financial environments using modern Generalized Autoregressive Conditional Heteroskedasticity (GARCH) models.

The S&P 500 index, a benchmark for the U.S. stock market, represents a mature and diversified financial landscape with a vast array of institutional investors, high-frequency trading, and advanced financial instruments that contribute to relatively predictable volatility patterns. In contrast, the Bucharest Stock Exchange, as an emerging market, is subject to different risk factors, including political instability, currency fluctuations, and lower market capitalization, making its volatility behavior unique. Given these disparities, this study seeks to determine how the volatility dynamics of an emerging market compare to a well-established global benchmark.

GARCH models have become a widely accepted tool for modeling and forecasting financial volatility, offering a robust framework to capture time-varying volatility clustering and persistence. Traditional financial models often assume constant variance, which does not accurately reflect real-world market conditions where volatility tends to exhibit long memory and reacts asymmetrically to market shocks. By employing variations of GARCH models, such as GARCH(1,1), EGARCH, and GJR-GARCH models, this study will analyze volatility patterns in both markets and assess the extent to which past volatility influences future fluctuations.

This research contributes to the existing literature by providing empirical evidence on the volatility characteristics of a developing financial market compared to a leading global index. The findings will offer valuable insights for investors seeking to diversify their portfolios across developed and emerging markets, as well as for policymakers aiming to enhance market stability. By leveraging advanced econometric techniques, this study aims to bridge the knowledge gap in comparative market volatility and provide a data-driven foundation for future risk management strategies.

## **Literature review**

The specialized literature includes a wide variety of empirical studies on the behavior of emerging and developed stock markets, such as: Trivedi and Birau (2013), Kumar et al. (2023), Hawaldar et al. (2020), Trivedi et al. (2022). Kumar et al. (2023) investigated the complex behavior of the emerging stock market from Brazil based on GARCH models for the very long time sample period from May 1993 until March 2023, considering IBOVESPA stock index. Meher et al. (2024a) have conducted a comparative research study between the stock markets from USA and Austria based on GARCH type models for the long time sampled horizon from January, 2000 until September, 2023. Moreover, Meher et al. (2024b) have managed to highlight a comparative analysis on the

behavior of the stock markets in USA and China for the sample period from January 2000 to March 2023.

Thorbecke (2023) investigated the stock market volatility in U.S. considering the effects of monetary policy and the turbulence generated by the negative impact of COVID-19 pandemic. Han and Xu (2025) also investigated the complex behavior of the developed stock market from U.S.A. Setiawan et al. (2021) have conducted a research study on both developing and developed stock markets behavior in the context of extreme events such as COVID-19 pandemic.

Petkov et al. (2024) managed to provide a case study based on financial econometrics using ARMA and GARCH models applied on Bulgarian emerging stock market for a very long time period from 2000 to 2024 which covers several extreme events, including global financial crisis of 2007-2008 but also COVID-19 pandemic. Mamilla et al. (2023) have also conducted an empirical study on the emerging stock market in India, such as National Stock Exchange (NSE) during COVID-19 pandemic using GARCH family models.

On the other hand, Machmuddah et al. (2020) examined the impact of COVID-19 pandemic and non - economic factors on stock market behavior. Moreover, Spulbar et al. (2022) have conducted a literature survey on certain key aspects of modern financial theory such as Efficient Market Hypothesis, Fractal Markets Hypothesis, but also Adaptive Market Hypothesis. In this sense it was analyzed in a comparative manner the impact of this essential paradigms such as EMH, AMH and FMH.

### **Research Methodology**

The study uses secondary data, and the nature of the data is quantitative. This research explores methods for quantifying the impact of the BET (Bucharest Exchange Trading) index and S&P 500 index volatility analysis for 1445 daily observations from 15/02/2019 to 30/01/2025. To make data stationary, the Log return has been calculated. Volatility clustering was observed in the data, leading to applying the ARCH LM test to assess for heteroscedasticity in the return series residuals. The study probes volatility using the different GARCH models with various distributions, including the Normal (Gaussian), Student's t, and Generalized Error (GED) distributions, both with and without specified parameters. Based on the values of AIC, SC, and Log Likelihood, the appropriate GARCH model is used for analysis. The software package used for analysis is EViews10.

### **Significance of the study**

This research offers valuable benefits to society by providing a deeper understanding of how financial markets operate. Advanced GARCH models are used to observe the volatility of the BET index and S&P 500 index. A deep understanding of market volatility is vital for investors, Financial Institutions, and the government as it allows them to reduce the risks and helps to make strategies more efficient and effective. The existing literature on this subject is scarce, and no research has yet explored individual analysis of BET and the S&P 500 index. The study's findings can be used to create more accurate models, leading to better market regulations. This study provides valuable insights for promoting financial resilience in Romania and the United States.

# Modeling Volatility Spillovers across emerging and developed stock markets using GARCH models: An empirical case study on the USA and Romania

## Limitations of the study

Although the study uses daily price data to provide a detailed volatility analysis, however, its reliance on statistical methods, exclusion of real-world complexities, and focus on conditional return variance create a generalized framework. This approach may not fully address all the relevant questions; interpreting focuses on theoretically more than practical.

- Limited availability of data: Data was sourced from BET (Bucharest Exchange Trading) index and S&P 500 index database, which is freely available. However, due to a lack of financial support, this study takes a broad approach, foregoing a detailed analysis of specific micro-level variations.
- Generalization of result: While the APARCH model is versatile, capturing leverage and volatility decay and even containing several GARCH models, it can't fully account for subjective, real-world complexities.
- Model Interpretability: PARCH model excels at modeling volatility dynamics, but its complexity makes it less suitable for identifying the specific, underlying causes of that volatility in a given scenario.
- Market dynamics and external variables: Because every market situation is different, even the sophisticated APARCH model can't ideally account for all the specific, complex, and interacting factors.

Considering the specific strengths and weaknesses of the APARCH and GARCH models, we will proceed with this research's analysis and estimation phase.

## Empirical analysis, Estimation, and Results

This part has been bifurcated into two sections to understand both indices better. The first section deals with the Bucharest Exchange Trading (BET) index, and the other deals with the S&P 500 index.

### *Bucharest Exchange Trading (BET) index*

To thoroughly understand price movements, a visual representation is essential. The graph below illustrates the actual price fluctuations.

The below graph represents the BET price index for almost 5 years. From the graph, it is visible that nearly in 2020, there was a dip, which may be because of some systematic and non-systematic reasons, and COVID-19 pandemic may be a reason for it. However, after 2021, there is a spike in the graph, and again, there is a dip between 2021 and 2022 due to some economic crisis. But after the middle of 2022, there is always an increase in the price. However, there was a high volatility rate during the entire duration.



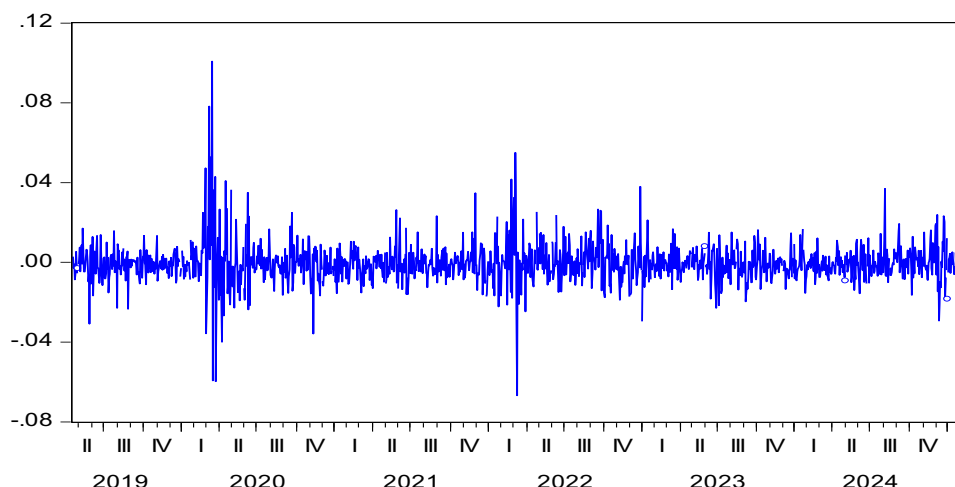
Figure 1. Daily Closing Price of Index

Source: author's Computation using EViews 10

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To make returns stationary, Log return has been calculated. The below graphical representations are of Log returns. As previously discussed, there is a spike in nearly 2020 and the middle of 2021 and 2022 for various reasons.

**BET index log returns**



*Figure 2 Log Returns Graph*

*Source: author's Computation using EViews 10*

While a visual assessment indicates possible heteroscedasticity, it is imperative first to conduct a test for stationarity.

**Test of stationarity**

**Table 1: Heteroscedasticity Test**

Null Hypothesis: BET_INDEX_LOG_RETURNS has a unit root		
Exogenous: Constant		
Lag Length: 1 (Automatic - based on SIC, maxlag=23)		
	t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic	-23.77573	0.0000
Test critical values:	1% level	-3.434680
	5% level	-2.863339
	10% level	-2.567777
*MacKinnon (1996) one-sided p-values.		

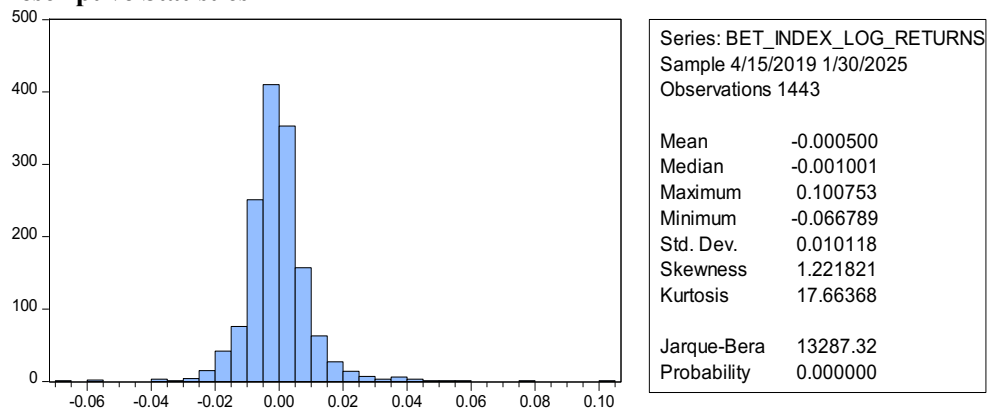
*Source: Author's Computation using EViews 10*

The above test is the Augmented Dickey-fuller (ADF) test. It can be observed that the probability value is less than 0.05, and test statistics are lower in value than the critical value at 5% interval; thus, we can say that data is a unit root and is stationary.



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### Descriptive Statistics



*Figure 3 Test Distribution Analysis*

*Source: Author's computation using EViews 10*

The above test statistics show that the average log return is slightly negative, indicating a slight downward trend. The central value is close to zero, suggesting a nearly symmetric distribution. The positive skewness indicates a distribution with a longer right tail, meaning occasional significant positive returns. A high kurtosis value signifies a leptokurtic distribution, indicating frequent extreme values compared to a normal distribution. Distributions are not expected due to high kurtosis and positive skewness.

### Heteroscedasticity Test

**Table 2: ARCH effect test**

Heteroskedasticity Test: ARCH			
F-statistic	99.31456	Prob. F(1,1440)	0.0000
Obs*R-squared	93.03595	Prob. Chi-Square(1)	0.0000

*Source: Author's computation using EViews 10*

The low probability value validates the presence of heteroscedasticity. The null hypothesis is rejected, affirming that the volatility depends on past residuals. GARCH family models are chosen over ARCH due to the limitations in considering weights, and many studies suggest that GARCH is appropriate for estimating the conditional variance of parsimonious models. For the appropriate GARCH model, GARCH, IGARCH, TARARCH, EGARCH, PARARCH, and APARCH were estimated across the five distributions.

After executing GARCH family models across Gaussian Normal Distribution, Student's t distribution, Generalized Error Distribution (GED), t distribution with fixed parameter, and GED with fixed parameter, it can be concluded from the below table that APARCH Student's t distribution is the appropriate model for having the lowest Akaike info criterion (-6.841217), lowest Schwarz criterion (-6.811959), and highest log likelihood (4940.518).

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Sunil Kumar, Ștefan Mărgăritescu**

**Table 3. Decision Table**

		GARCH	IGARCH	TARCH	EGARCH	PARCH	APARCH
<b>Normal Distribution</b>	<i>Akaike info criterion</i>	-6.753	-6.689123	-6.766181	-6.763894	-6.752953	-6.769872
	<i>Schwarz criterion</i>	-6.734714	-6.678151	-6.744237	-6.74195	-6.731009	-6.744272
	<i>Log Likelihood</i>	4873.913	4825.858	4884.416	4882.767	4874.879	4888.078
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Student's T</b>	<i>Akaike info criterion</i>	-6.837877	-6.798128	-6.841858	-6.835358	-6.83649	-6.841217
	<i>Schwarz criterion</i>	-6.815933	-6.783499	-6.816257	-6.809757	-6.810889	-6.811959
	<i>Log Likelihood</i>	4936.109	4905.45	4939.979	4935.293	4936.109	4940.518
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Generalized Error</b>	<i>Akaike info criterion</i>	-6.830299	-6.792333	-6.83535	-6.830953	-6.829036	-6.835513
	<i>Schwarz criterion</i>	-6.808355	-6.777704	-6.809749	-6.805352	-6.803435	-6.806255
	<i>Log Likelihood</i>	4930.645	4901.272	4935.287	4932.117	4930.735	4936.405
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>T distribution (Parameter)</b>	<i>Akaike info criterion</i>	-6.822788	-6.784195	-6.82925	-6.816092	-6.821459	-6.8294
	<i>Schwarz criterion</i>	-6.804501	-6.773223	-6.807306	-6.797805	-6.799516	-6.803799
	<i>Log likelihood</i>	4924.23	4894.404	4929.889	4919.402	4924.272	4930.998
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Generalised Error (Parameter)</b>	<i>Akaike info criterion</i>	-6.818672	-6.776025	-6.826056	-6.821848	-6.817632	-6.827042
	<i>Schwarz criterion</i>	-6.800386	-6.765053	-6.804112	-6.799904	-6.795688	-6.801441
	<i>Log Likelihood</i>	4921.262	4888.514	4927.586	4924.552	4921.513	4929.297
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes

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**Table 4. APARCH (1,1) models, Student's t-distribution**

Dependent Variable: BET_INDEX_LOG_RETURNS				
Method: ML ARCH - Student's t distribution (BFGS / Marquardt steps)				
Date: 02/08/25 Time: 01:02				
Sample (adjusted): 4/17/2019 1/30/2025				
Included observations: 1442 after adjustments				
Convergence achieved after 41 iterations				
Coefficient covariance computed using outer product of gradients				
Presample variance: backcast (parameter = 0.7)				
@SQRT(GARCH)^C(7) = C(3) + C(4)*(ABS(RESID(-1)) - C(5)*RESID(-1))^C(7) + C(6)*@SQRT(GARCH(-1))^C(7)				
Variable	Coefficient	Std. Error	z-Statistic	Prob.
C	-0.000797	0.000183	-4.350860	0.0000
BET_INDEX_LOG_RETURNS(-1)	0.076512	0.026895	2.844874	0.0044
Variance Equation				
C(3)	3.99E-05	7.66E-05	0.521605	0.6019
C(4)	0.163536	0.035661	4.585837	0.0000
C(5)	-0.257256	0.113378	-2.269019	0.0233
C(6)	0.779451	0.039415	19.77533	0.0000
C(7)	1.602745	0.410115	3.908040	0.0001
T-DIST. DOF	4.899650	0.702168	6.977889	0.0000
R-squared	-0.001729	Mean dependent var		-0.000502
Adjusted R-squared	-0.002425	S.D. dependent var		0.010121
S.E. of regression	0.010133	Akaike info criterion		-6.841217
Sum squared resid	0.147859	Schwarz criterion		-6.811959
Log likelihood	4940.518	Hannan-Quinn criter.		-6.830296
Durbin-Watson stat	2.097910			

*Source: Author's computation using EViews 10*

From the above APARCH(1,1) models analysis, it can be concluded that variance equations show volatility clustering asymmetric leverage effect, a high tenacity of volatility propound, and that market turbulence tends to last over time. The student's t-distribution indicates heavy tails, which means extreme returns. Model diagnostics, including a log-likelihood (4940.518) and AIC (-6.8412), suggest a well-fitting model. The result also emphasizes market risks, which is critical for investors and risk managers. The model is as follows:

$$y_t = x_t \xi + \varepsilon_t$$

$$t = 1, 2 \dots T$$

$$\sigma_t^\delta = \omega + \sum_{j=1}^q \alpha_j (|\varepsilon_{t-j}| - \gamma_j \varepsilon_{t-j})^\delta + \sum_{i=1}^p \beta_i (\sigma_{t-i})^\delta$$

$$\varepsilon_t = \sigma_t z_t, z_t \sim N(0, 1)$$

$$k(\varepsilon_{t-j}) = |\varepsilon_{t-j}| - \gamma_j \varepsilon_{t-j}$$

The APARCH equation has to satisfy the following conditions:

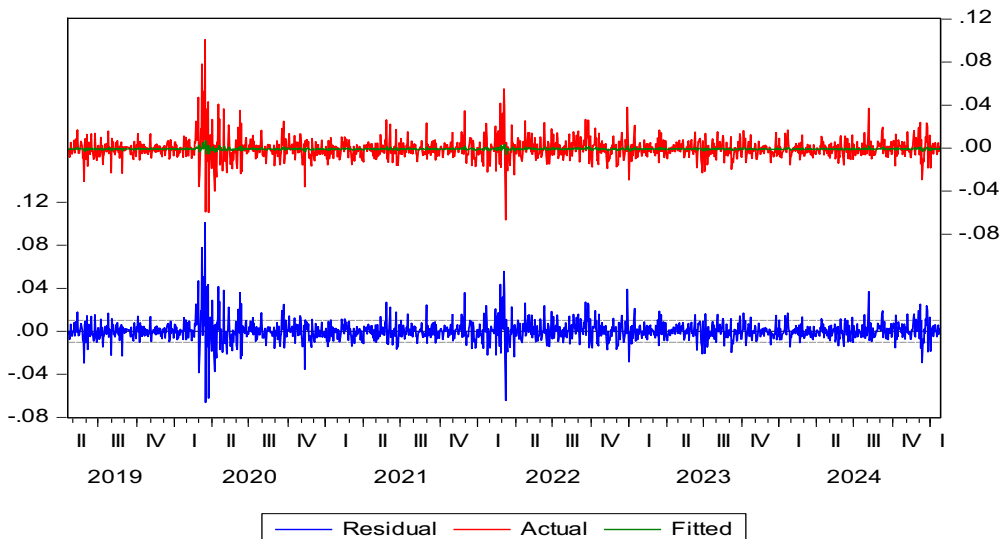
1.  $\omega > 0, \alpha_j \geq 0, j = 1, 2, \dots, q, \beta_i \geq 0, i = 1, 2, \dots, p$  when  $\alpha_j = 0, j = 1, 2, \dots, q, \beta_i = 0, i = 1, 2, \dots, p$ , then  $\sigma_t^2 = \omega$ . Due to this, the variance is positive, so  $\omega > 0$ .
2.  $0 \leq \sum_{i=1}^q \beta_i \leq 1$

**Table 1. APARCH Coefficients and their meanings**

Notation	Meaning
$\omega$ C (3)	A constant term representing the baseline of volatility
$\alpha$ C (4)	Persistence of Volatility/Positive Shock
$\gamma$ C (5)	Leverage Effect
$\beta$ C (6)	Persistence of Volatility/Negative Shock
$\delta$ C (7)	Decay Rate/Power Term

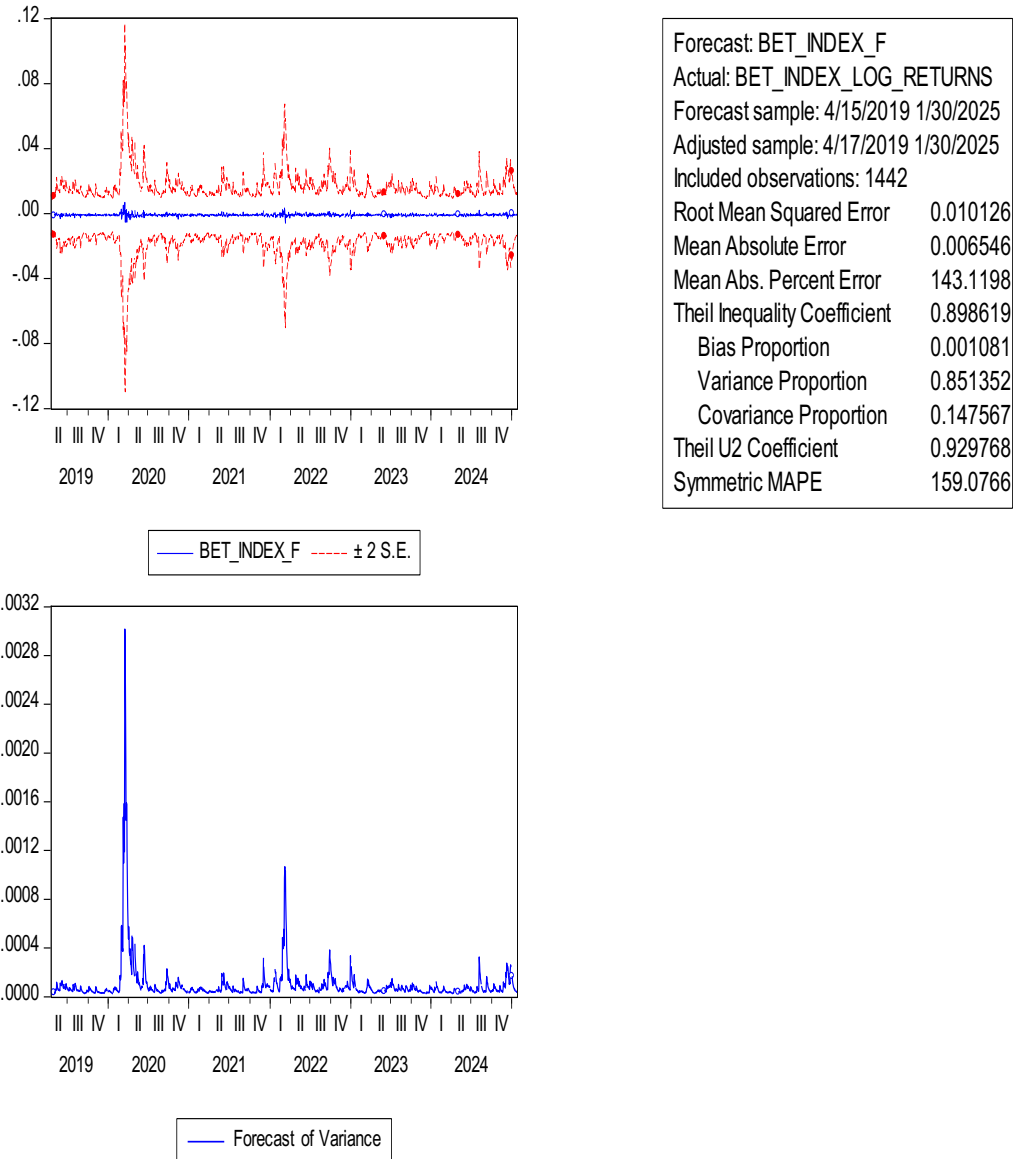
*Source: Author's computation*

From the above APARCH model analysis, it can be estimated that  $\omega$  is not statistically significant. Stock returns are driven by company-specific factors like shocks, leverage, asymmetry, and volatility, not market trends.  $\alpha$  represents the persistence of shocks at 0.163536, which states the presence of positive shocks but not at a significant level.  $\beta$  represents the persistence of negative shocks and the effect of volatility at 0.779451, which states that negative shocks' strong influence on volatility may be because of COVID-19 pandemic and other economic problems.  $\delta$  represents the decay rate/power term at 1.602745, which means that there is a high decay rate and the effects of decay are long-lasting.  $\gamma$  values are -0.257256, which indicates asymmetric results and volatility clustering, resulting in long-term volatility.



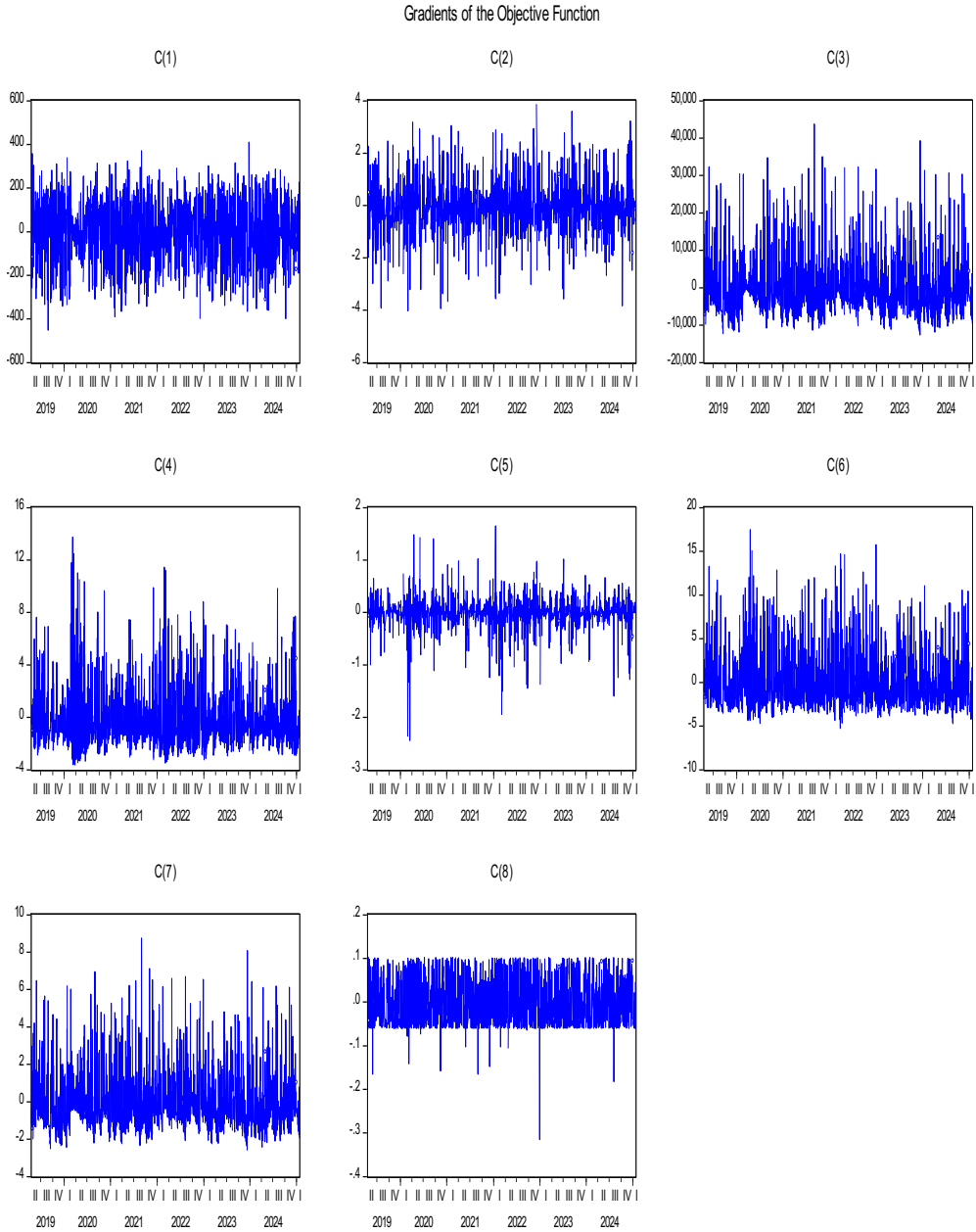
*Figure 4. Graphical representation of estimated volatility  
Source: author's Computation using EViews 10*

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*Figure 5 Graphical representation of Forecast of Prices Returns and Volatility  
Source: author's Computation using EViews 10*

From the above graphical representations, we can easily conclude that there was volatility around 2020 due to COVID-19 pandemic. Graphs explain the nature of volatility, and residual graphs correspond to the actual volatility.



*Figure 6 Gradients of the objective function*

*Source: author's Computation using EViews 10*

The above graphs are the gradients of the objective functions from the parameters C1 to C8, which contribute a crucial role in the optimization process. From the graphs, we can see that gradients indicate high fluctuations initially. Still, after some time, most of the gradients stabilize to nearly zero, which means that the model is appropriately linked up and estimates have reached the optimum value.

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Coefficients C3, C6, and C7 show huge variances in gradients, which means that the parameters might be sensitive to the market. Spikes in gradients suggest high market uncertainty.

Now, we are moving forward with the analysis for the rest part of the paper.

### **S&P 500 INDEX**

Below is the graphical representation of the S&P 500 index price over five years, and from the graph, it is clearly visible that there is a sharp dip in nearly 2020; this may be because of some financial problems and the COVID-19 pandemic. After 2020, the economic situation has changed as the graph shifts upward. During the entire framework, there is high volatility.

S&P 500 index - daily closing price

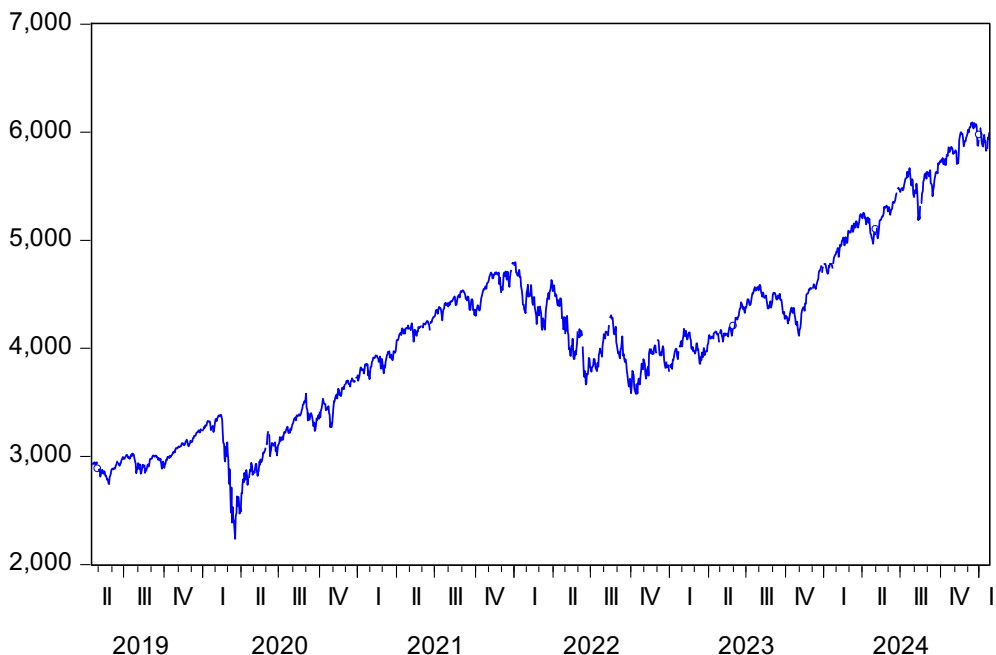


Figure 7. Daily Closing Price of S&P 500 index

Source: author's Computation using EViews 10

To make returns stationary, Log return has been calculated. The below graphical representations are of Log returns. As discussed earlier, there is a spike in nearly 2020, and during the entire period, there is high volatility.

S&P 500 index - log returns

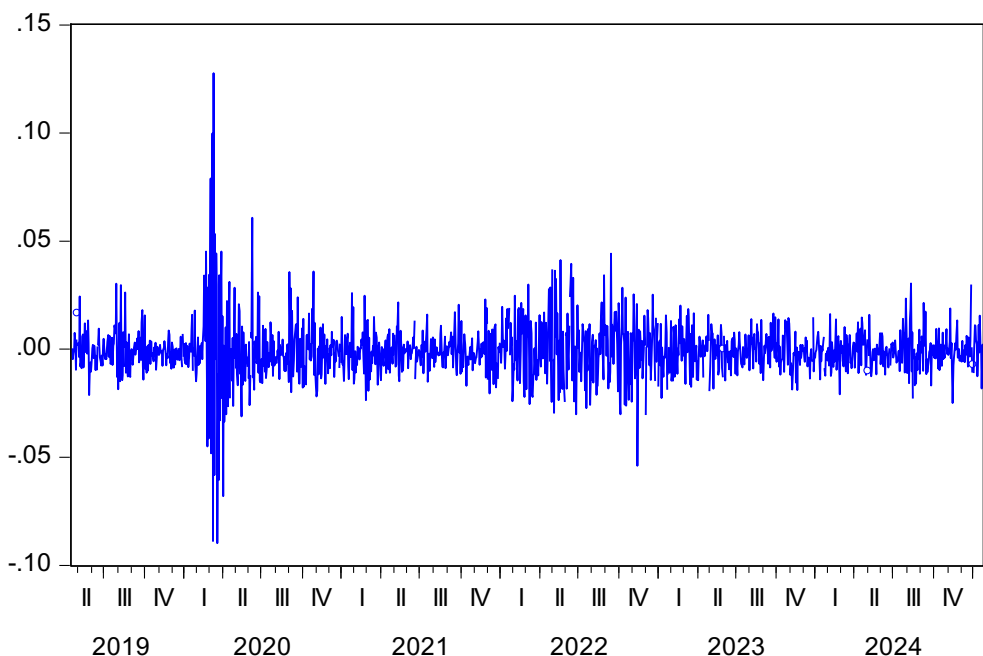


Figure 8. Log Returns Graph

Source: author's Computation using EViews 10

While a visual assessment indicates possible heteroscedasticity, it is imperative first to conduct a test for stationarity.

**Test of stationarity**

Null Hypothesis: S_P_500_INDEX__LOG_RETURNS has a unit root		
Exogenous: Constant		
Lag Length: 9 (Automatic - based on AIC, maxlag=23)		
		t-Statistic Prob.*
Augmented Dickey-Fuller test statistic		-11.36657 0.0000
Test critical values:	1% level	-3.434705
	5% level	-2.863351
	10% level	-2.567783
*MacKinnon (1996) one-sided p-values.		

Table 6: Heteroscedasticity Test

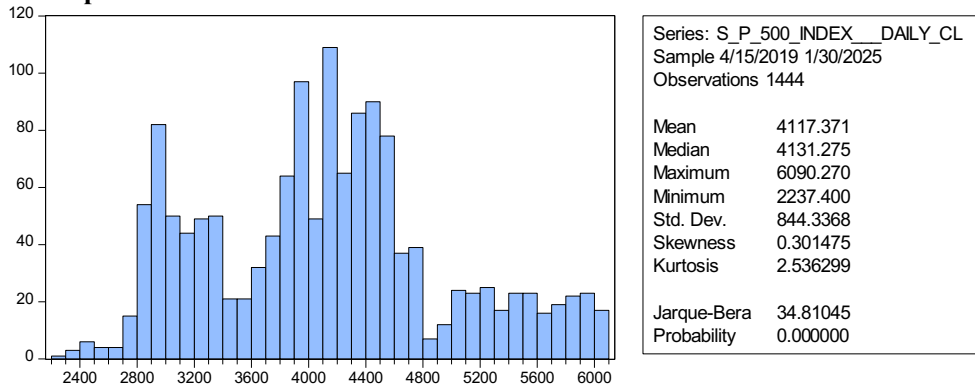
Source: Author's Computation using Eviews 10

The above test is the Augmented Dickey-fuller (ADF) test. It can be observed that the probability value is less than 0.05, and test statistics are lower in value than the critical value at 5% interval; thus, we can say that data is a unit root and is stationary.



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### Descriptive Statistics



*Figure 9 Test Distribution Analysis*  
*Source: Author's computation using EViews 10*

The above histogram and statistical summary show significant growth, ranging from 2,237.40 to 6,090.27, with a median of 4131.275, which shows a balanced distribution. Standard deviation shows high ups and downs in the market. Positive skewness (0.301475) shows a higher index value. Kurtosis suggests that data has peaked slightly more than usual.

### Heteroscedasticity Test

Heteroskedasticity Test: ARCH			
F-statistic	453.2161	Prob. F(1,1440)	0.0000
Obs*R-squared	345.1997	Prob. Chi-Square(1)	0.0000

**Table 7: ARCH effect test**

*Source: Author's computation using EViews 10*

The ARCH heteroskedasticity test results indicate a variance of errors in time series that is constant or slightly changing over a period of time. From the above data, the null hypothesis is rejected, confirming heteroskedasticity's presence and affirming that the volatility depends on past residuals.

GARCH family models are chosen over ARCH due to the limitations in considering weights, and many studies suggest that GARCH is appropriate for estimating the conditional variance of parsimonious models. For the appropriate GARCH model, GARCH, IGARCH, TARCH, EGARCH, PARCH, and APARCH were estimated across the five distributions.

After executing GARCH family models across Gaussian Normal Distribution, Student's t distribution, Generalized Error Distribution (GED), t distribution with fixed parameter, and GED with fixed parameter, it can be concluded from the below table that APARCH Student's t distribution is the appropriate model for having the lowest Akaike info criterion (-6.457557), lowest Schwarz criterion (-6.428299), and highest log likelihood (4663.898).

**Sahil Raza, Bharat Kumar Meher, Virgil Popescu, Ramona Birau,  
Sunil Kumar, Ștefan Mărgăritescu**

Table 8. Decision Table

		GARCH	IGARCH	TARCH	EGARCH	PARCH	APARCH
<b>Normal Distribution</b>	<i>Akaike info criterion</i>	-6.368797	6.327358	6.392204	-6.397646	-6.374493	-6.409433
	<i>Schwarz criterion</i>	-6.357825	6.316386	-6.37026	-6.375702	-6.352549	-6.383832
	<i>Log Likelihood</i>	4594.903	4565.025	4614.779	4618.703	4602.01	4628.201
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Student's T</b>	<i>Akaike info criterion</i>	-6.417951	6.394172	6.444504	-6.449703	-6.396354	-6.457557
	<i>Schwarz criterion</i>	-6.396007	6.379543	6.418903	-6.424102	-6.374411	-6.428299
	<i>Log Likelihood</i>	4633.343	4614.198	4653.487	4657.236	4617.771	4663.898
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Generalized Error</b>	<i>Akaike info criterion</i>	-6.411993	6.384431	6.430444	-6.433808	-6.410606	-6.441572
	<i>Schwarz criterion</i>	-6.390049	6.369802	6.404843	-6.408207	-6.385005	-6.412314
	<i>Log Likelihood</i>	4629.047	4607.175	4643.35	4645.775	4629.047	4652.374
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>T distribution (Parameter)</b>	<i>Akaike info criterion</i>	-6.416382	6.392051	6.442412	-6.447657	-6.414995	-6.456366
	<i>Schwarz criterion</i>	-6.398095	6.381079	6.420468	-6.425713	-6.393051	-6.430766
	<i>Log likelihood</i>	4631.211	4611.669	4650.979	4654.76	4631.211	4662.04
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No

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	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes
<b>Generalised Error (Parameter)</b>	<i>Akaike criterion info</i>	-6.411835	-6.381729	-6.430182	-6.43385	-6.410453	-6.442165
	<i>Schwarz criterion</i>	-6.393549	-6.370757	-6.408238	-6.411907	-6.38851	-6.416564
	<i>Log Likelihood</i>	4627.933	4604.227	4642.161	4644.806	4627.937	4651.801
	<i>ARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>Autocorrelation</i>	No	No	No	No	No	No
	<i>ARCH LM-Test</i>	No	No	No	No	No	No
	<i>GARCH significant</i>	Yes	Yes	Yes	Yes	Yes	Yes
	<i>significant coefficient</i>	Yes	Yes	Yes	Yes	Yes	Yes

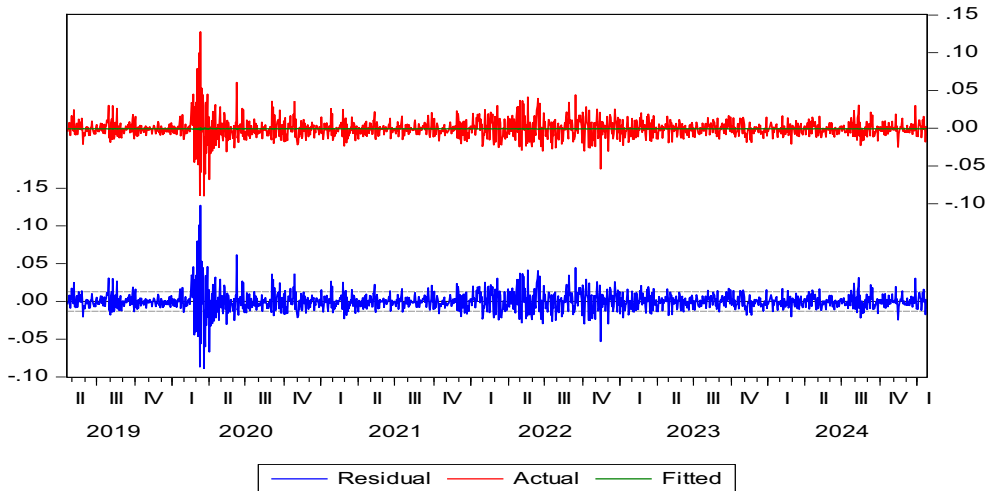
*Source: author's tabulation using MS Office*

**Table 9. APARCH (1,1) Student's t-distribution**

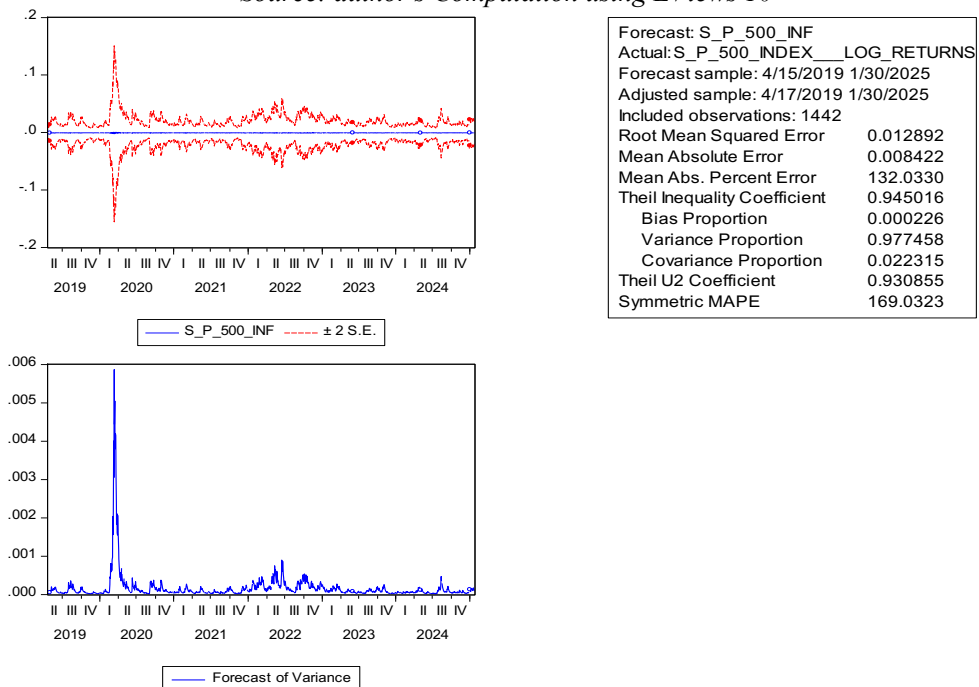
Dependent Variable: S_P_500_INDEX__LOG_RETURNS				
Method: ML ARCH - Student's t distribution (BFGS / Marquardt steps)				
Date: 02/11/25 Time: 00:18				
Sample (adjusted): 4/17/2019 1/30/2025				
Included observations: 1442 after adjustments				
Failure to improve likelihood (non-zero gradients) after 87 iterations				
Coefficient covariance computed using outer product of gradients				
Presample variance: backcast (parameter = 0.7)				
$\text{@SQRT(GARCH)}^C(7) = C(3) + C(4) * (\text{ABS}(\text{RESID}(-1)) - C(5) * \text{RESID}(-1))^C(7) + C(6) * \text{@SQRT(GARCH}(-1))^C(7)$				
Variable	Coefficient	Std. Error	z-Statistic	Prob.
C	-0.000698	0.000217	-3.216976	0.0013
S_P_500_INDEX__LOG_RETURN				
S(-1)	-0.013445	0.026652	-0.504458	0.6139
Variance Equation				
C(3)	0.000734	0.000648	1.131951	0.2577
C(4)	0.117672	0.019040	6.180191	0.0000
C(5)	-0.982022	0.142006	-6.915357	0.0000
C(6)	0.873757	0.019680	44.39819	0.0000
C(7)	0.888089	0.173228	5.126697	0.0000
T-DIST. DOF	7.085502	1.144930	6.188589	0.0000
R-squared	0.004258	Mean dependent var		-0.000498
Adjusted R-squared	0.003566	S.D. dependent var		0.012924
S.E. of regression	0.012901	Akaike info criterion		-6.457557
Sum squared resid	0.239671	Schwarz criterion		-6.428299
Log likelihood	4663.898	Hannan-Quinn criter.		-6.446635
Durbin-Watson stat	2.317234			

*Source: Author's computation using EViews 10*

The above APARCH(1,1) analysis reveals significant insights into market volatility. The mean equation shows a small negative average return, which indicates that past returns do not strongly influence future returns. The model effectively captures the persistence and asymmetry of volatility in the S&P 500, highlighting that market fluctuations are influenced more by negative shocks and tend to remain high once they increase.



*Figure 10. Graphical representation of estimated volatility  
Source: author's Computation using EViews 10*

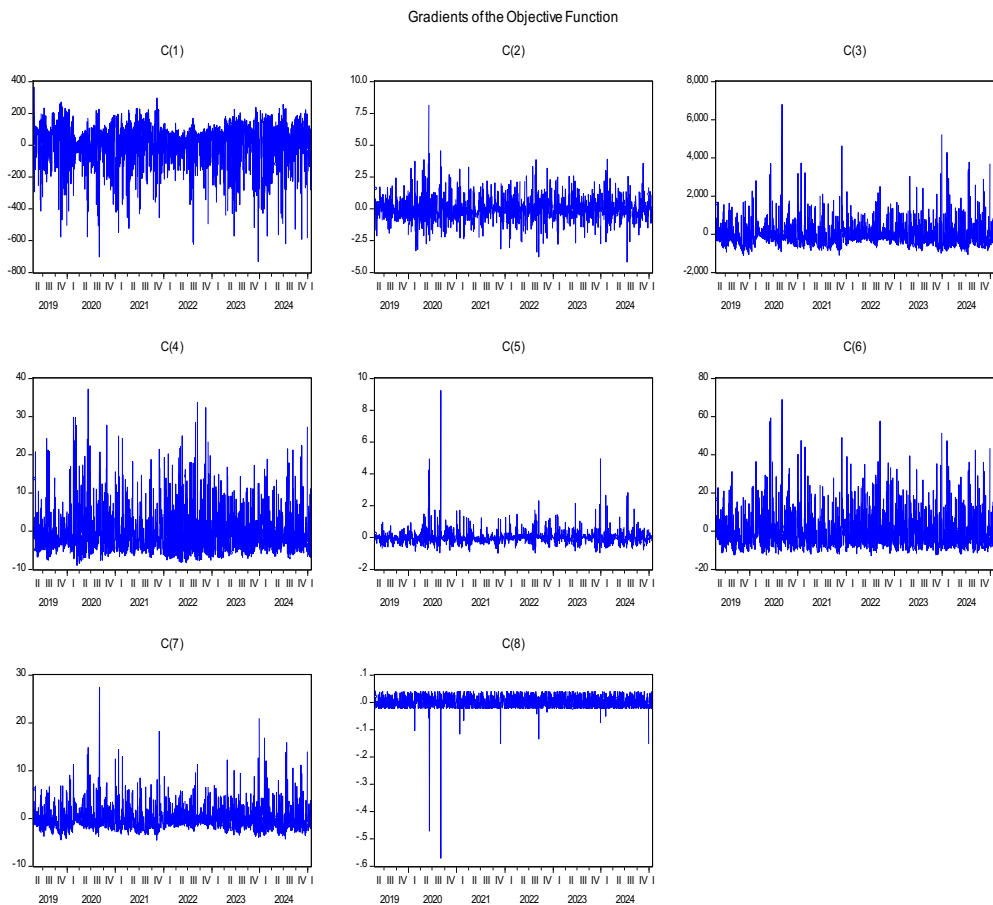


*Figure 11. Graphical representation of Forecast of Prices Returns and Volatility  
Source: author's Computation using EViews 10*

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The above forecast analysis for S&P 500 log returns provides insights into model accuracy and volatility behavior. Root Mean Squared Error (0.012892) and Mean Absolute Error (0.008422) indicate a moderate level of forecasting accuracy, and Mean Absolute Percentage Error (132.03%) suggests large percentage deviations in some of the cases. The forecast variance shows that market volatility spiked significantly around 2020, likely due to external shocks such as the COVID-19 pandemic and other economic problems, but stabilized after some time, though with some occasional fluctuations.

The model captures volatility clustering, but its predictive accuracy remains limited due to high variance and unexpected market shocks. Future improvements could involve refining the model with longer lags, exogenous variables, or alternative GARCH specifications to capture sudden market shifts better.



*Figure 12 Gradients of the objective function*

*Source: author's Computation using EViews 10*

The above graphs are the gradients of the objective functions from the parameters C1 to C8, which contribute a crucial role in the optimization process. The charts show that gradients indicate that coefficients exhibit high variability, indicating that the model adjusts to changing market conditions. Parameters such as C2, C5 and C7 show spikes likely because of extreme market events or financial crises, reflecting the presence of

volatility clustering. C8 remains the same, suggesting it is less sensitive to market fluctuations.

The coefficient changes show that the model adjusts well to market ups and downs. However, more analysis is needed to check if the parameters remain stable over time and improve predictions' accuracy.

### **Conclusions**

APARCH (1,1) is the fittest model for studying the volatility of BET and S&P 500 stock market indices. We observed asymmetry, volatile clustering, leverage effect, and volatility in both indexes. It may be because of the COVID-19 pandemic and other associated variables such as inflation, demand-supply asymmetric, and microeconomic factors.

A study comparing GARCH, TGARCH, IGARCH, EGARCH, PARCH, and APARCH models across six different distributions found that the APARCH model with a Student's t-distribution provided the best fit for the data. This conclusion was based on the lowest Akaike Information Criterion (AIC), lowest Schwarz Criterion (SC), and highest Log Likelihood measures.

Even though APARCH model is a good model, it is imperfect because it can't measure what might influence things. Sometimes, it portrays them less accurately. For the academic community, it is essential to do an in-depth analysis for the finest details to avoid generalization. For this, various models, such as Machine Learning, COPULA, AI, and VaR, can show the larger picture and assess more information that benefits society, investors, and policymakers.

### **Authors' Contributions:**

The authors contributed equally to this work.

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## ORIGINAL PAPER

# Loneliness in the Pandemic Context: Understanding its Impact, Causes and Pathways to Intervention

Roxana Pleșa<sup>1)</sup>

**Abstract:**

**Background:** The COVID-19 pandemic has dramatically altered the way individuals interact, leading to a surge in social isolation and loneliness. This paper explores the psychological, social, and emotional impact of loneliness during the pandemic, delving into its causes, consequences, and potential interventions. By examining existing literature and empirical studies, this research seeks to understand how the pandemic exacerbated feelings of loneliness and the long-term implications for mental health. The paper also highlights specific at-risk populations, including the elderly, individuals with pre-existing mental health conditions, and those with limited access to social support. Finally, it proposes practical strategies and policy recommendations to mitigate the effects of loneliness during future global crises.

**Methods:** The complexity of the research topic led to the use of multiple research methods. The individual interview was used, whose structured interview guide was based on some scales commonly used in psychology and social sciences established theories. We also used a series of psychological tests.

the phenomenon of loneliness in its global dimensions, we also analyzed the results obtained by research conducted by Kaiser Family Foundation – The Economist Survey on Loneliness and Social Isolation in the U.S, U.K. and Japan.

**Conclusion:** The fundamental conclusion of the study is that loneliness influences the subjective perception of the quality of life and implicitly satisfaction with life.

**Keywords:** *Quality of Life, Loneliness, Satisfaction with life, Subjective perception, Subjective well-being, Self-esteem*

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## 1. Introduction

The COVID-19 pandemic, a global health crisis that affected millions, reshaped the social landscape, creating conditions conducive to loneliness and isolation. Loneliness, previously a growing concern, became a widespread issue, affecting diverse populations globally.

This paper aims to explore the multifaceted nature of loneliness in the pandemic context, focusing on the underlying factors that contributed to its rise, the psychological and physical consequences, and the importance of addressing it within public health discourse.

## 2. Literature review

Current humanities generally emphasize that human life is dominated by the need to update, so the assertion of personality, needs more than a simple balance with the environment. Satisfactions occur as a result of human development effort beyond the permanent attempts to overcome petty frustrations that can occur everywhere (Veenhoven, 2000).

This means that, in assessing the level of satisfaction of the individual to the aspects of life, the decisive role is played by critical analysis he makes his own existence, considering the objectives and achievements. Expresses satisfaction evaluation result made continuously subject on their living conditions, the degree to which they are to expectations (Friedman & Ryff, 2015).

Loneliness is very common in present-day society among perfectly normal and quite well-balanced people (Gibson, 2000).

The term “loneliness” refers to both an experience and a feeling or emotion (Cacioppo & Patrick, 2008). One may speak of two kinds of loneliness: as a trait or a state; we may all experience the latter when we are undergoing a temporary period of being cut off from the sort of social interactions that satisfy us, and it will disappear when we move to a more satisfactory milieu. Trait loneliness, however, is more likely to refer to the individual’s basic personality; some people with the trait of loneliness may be lonely all their lives in whatever circumstances they may live. In any instance it is difficult to say whether loneliness is due to a person’s basic trait or to the state they are living in (Hawkey & Cacioppo, 2010).

The question of “What is loneliness?” does not call for any dictionary-type definition and in later life we may experience varieties of loneliness that are not common in our earlier years.

There are approaches that extend the concept of subjective well-being to overlap with the subjective quality of life, perceived quality of life (Bowling, 2005).

Specialized research showed that well-being subjective consists of two components: (a) general judgments about the satisfaction in life and (b) the balance of affective or the extent to which the level of positive effect outweighs the negative effect in the individual's life (Bradburn, 1999; Cacioppo et al., 2010; Cacioppo et al., 2014).

Self-determination theory argues that people in innate tendency to feed the ego has three basic psychological needs, namely the need for autonomy, competence need and the need to have relations with others. Autonomy implies that the person can decide voluntarily and that it is itself the agent performing the action, so as so be consistent and assuming complete this. The second fundamental need is the need for competence. Competence refers to a person's sense of efficacy that is in its environment, which stimulates curiosity, exploration and open to challenge. For those who feel the need relationships with others, the third fundamental need, implies a sense of belonging and a sense of feeling interconnected with people who are important to themselves. To feel the attention and sympathy of others

## **Loneliness in the Pandemic Context: Understanding its Impact, Causes and Pathways to Intervention**

confirms that individual represents something significant for others and that constitute as of concern on their part.

These three fundamental needs are considered as specific nutrients essential in increasing the satisfaction of psychological nature, integrity and well-being. The theory suggests that if you meet any of these needs is compromised-in any field or at any stage of development-it will automatically record a decrease in well-being.

One of the most pressing needs for people in general, is the urgent requirement of communication and interaction with others. Human environment due to contact between people is an essential source of individual well-being, psychological and moral equilibrium. Interpersonal relationships are an important area of life of everyone contributing in many fields, the dynamic quality of life (Friedman & Ryff, 2015).

In the absence of interaction and communication with others around installs strong feelings of loneliness, with devastating effects on physical and mental health of the elderly (Loades et al, 2020). Loneliness can affect considers R. Bennett (1980), the basic physiological processes of the body, affecting the feeling of well-being and life satisfaction.

While social isolation refers to the lack of social contacts or engagement, emotional loneliness pertains to the absence of meaningful or intimate relationships. Existential loneliness, on the other hand, is a sense of disconnection from the world at large, which can be exacerbated by societal disruptions, such as those witnessed during the pandemic (Barnet et al., 2020).

Loneliness itself is not a problem, if not lead to isolation and lack of social relations, in which the person is deprived of the company and privacy crucial for a healthy and happy life. Studies show that individuals whose needs are not satisfied networking dissatisfied with life than those living with others, are more prone to depression and poor health status, have a low quality of life (Killgore et al., 2020).

### **3. Methodology**

#### **3.1. Objective of the study**

The overall objective of this research is to highlight the effects of the state of loneliness experienced on perceived quality of life.

#### **3.2. The hypotheses of the study**

1. Loneliness affects satisfaction with life.
2. The subjects who often feel loneliness present a higher level of depression.
3. The subjects who often feel loneliness present a higher level of anxiety.

#### **3.3. Methods and Materials**

This study combined quantitative and qualitative methods. A personal interview was used, whose items were constructed based on existing information in the literature, but also from established theories of psychosocial sciences, with which it was built a global picture of appreciation of life as a whole.

Also, we used psychological tests, which were measured using state of loneliness felt the effects on subjective evaluation of aspects of life.

In addition to research design was used and the method of observation in order to capture and record detailed reactions and forms of behavior of subjects undergoing study.

### 3.4. Participants

**Table 1. Percentage Distribution of the Respondents' Profile**

Study Subjects	N	Male	Female
Subjects often feeling loneliness	260	50%	50%
Subjects never feeling loneliness	260	50%	50%

### 3.5. Instruments

The interview guide used was build in such a way that his questions highlight all the dimensions of the concept of quality of life.

The UCLA Loneliness Scale used for demonstration of solitude to what degree. It is most commonly used instrument containing 10 items, each item is rated on a Likert -type scale from 1 to 4, where 1 - never and 4 - often. The final score is obtained by summing the points obtained for each of the 10 items .

Hamilton Anxiety Scale HAM-A is a psychological tool used to highlight the severity of the anxiety condition. The instrument contains 14 items, each of which is comprised of a group of symptoms , the first 7 items assessing mental anxiety manifestations and the following 7 items showing somatic manifestations of anxiety. The 14 items are evaluated by the subjects on a Likert -type scale from 1 to 4, where 1 - not at all and 4 - seriously, the total score is obtained by summing the points obtained from the 14 items.

Beck Depression Inventory is one of the tools most commonly used to measure the severity of depression. The instrument contains 21 groups of statements. The subject must choose one statement from each of these groups, corresponding to the state it is. Each group contains 4 statements marked from 0 to 3, the total score is obtained by adding all points from the 21 groups of statements.

### 3.6. Procedure

For start, the interview guide was applied, then the scales and psychological tests. The researcher created a relaxed atmosphere and friendly study, assuring the confidentiality and anonymity of the subjects of their responses. Results and final conclusions were obtained by interpreting quantitative and qualitative data.

### 3.7. Data Analysis

Statistical analysis was performed using SPSS 17.0 and applying that data processing methods, the following tests: T-test for independent samples-to test the difference between the averages of the measured variables on the same two batches consisting of different subjects; The chi -square test- to highlight the degree of association between two categorical variables; the Pearson linear correlation coefficient - assess the association between two variables.

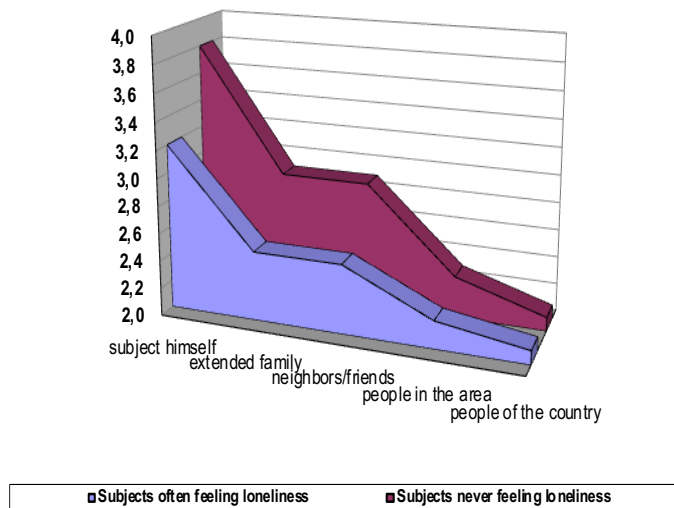
# Loneliness in the Pandemic Context: Understanding its Impact, Causes and Pathways to Intervention

## 4. Results

The quality of human life is linked to the subjective processes. A number of researches in the field of quality of life, included in this paper demonstrate the synthesis of happiness (1) have taken into account the influence of social comparison; the findings converge to the idea of a significant correlation between the perception of one's own State of satisfaction and perception of the satisfaction of others.

Taking this idea, we used the comparison as a model of social changes in the evaluation of satisfaction with life of subjects of our research. We wanted to highlight the variation between the perception of the individual satisfaction of its own towards life and its effects on the perception of life satisfaction of members of other social groups-the group of relatives, neighbors/friends, people in the area and people in the country. We also wanted to highlight the comparative results between the group of subjects who often express feelings of loneliness and those who never feel loneliness.

Average scores obtained in each of the five indicators were summarized in figure no. 1, that there is a regularity in assessing their state of satisfaction and contentment perception of others. Thus, if the perception of individual satisfaction is relatively high, as you evaluate areas increasingly remote from individual perceptual level of satisfaction with life decreases. Although there is a downward curve in the perception of quality of life in both samples idea before, there is a notable difference between the two batches.



**Fig. 1 . The perception of satisfaction with life subjects and members of other social groups (weighted average)**

A sociological research carried out in 1999, by Bălătescu and published in the journal quality of life has singled out the same conclusion surprised and in our research, that individual perception is increasingly negative as the reference sphere is more distant from the topic, thereby confirming the existence of a rule in the perception of the satisfaction of members of other social groups. The author has called this the "regular curve downward comparison of life satisfaction"(18).

## Roxana Pleșa

In terms of size components spheres of life, satisfaction with life being actually the result of the assessment of these areas, capture elements of support, but also critical elements in the development of self-perceived quality of life by study subjects. Using procedure called SEDA (absolute data assessment scheme) - data interpretation process variables by reference to a scale with five values - we compared the results obtained highlight the two groups of subjects. Absolute data evaluation scheme was used for the first time by Zamfir, in 1980, (19) and suggests a split 1-5 scale intervals with different meanings. Each interval is associated with a qualitative interpretation of values that fall within its limitations. Taking this interpretation and adapting it to the conducted research, we present a comparative picture between the two groups of subjects, shown in figure no.2.

	1.00	3.00	3.50	3.75
Variables	Serious situation	Normal situation		Very good situation
		Critical points	Attention, problems!	good
4.00	5.00			

### *Personal life*

health.....+1.16.....×2.60  
 family income.+1.14.....×2.74  
 home.....+3.75.....×3.85  
 family life.....+1.40.....×4.11  
 relations with neighbors.....+3.82.....×3.91  
 home security.....+3.56.....×3.68  
 street safety.....+1.50..×1.70  
 leisure.....+3.10...×3.21  
 rights.....+2.14...×2.33  
 achievements in life.....+3.70...×3.75

### *Social life*

healthcare.....+3.10×3.11  
 police and justice.....+2.60×2.78  
 political life.....+1.98.×2.05  
 the leadership society...+1.96×1.98  
 human relationships.....+2.64×2.84  
 environmental.....+3.20×3.33

### *Satisfaction with life*

satisfaction of everyday life +2.43.....×3.46

+ – data recorded in the group of subjects who often feel loneliness  
 × - data recorded in the group of subjects who never feel loneliness

**Fig.2. Interpretation spheres quality of life using the SED**

Human environment due to contact between people is an essential source of individual well-being, psychological and moral equilibrium.

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In our research subjects, state of loneliness imposed by the actual situation (physical loneliness) turned into a state of loneliness, with unpleasant consequences psycho -emotional health, psychological wellbeing, the quality of life.

**Table 2. Presentation obtained results with the test t for the state of loneliness felt**

Study Subjects	N	Minimum	Maximum	Average	Standard deviation	t	p
Subjects living alone	240	23.72	28.48	26.10	6.386		
(p<0.05) Subjects living with husband/ wife or in a couple	280	17.54	20.66	19.10	4.172	25.077	

“Well-being” subjective component consists of two general: first, assessments related to life satisfaction and, secondly, emotional balance or measure the level of positive affect than negative affect level of the individual's life.

Structured data in table 3, obtained by applying the chi-square test of significance, shows a significant association ( $p < 0.05$ ) between the state of loneliness experienced by study subjects and psychological wellbeing. The results structured in this table support the first hypothesis of the study, that " loneliness affects satisfaction with life ".

**Table 3. The results obtained by applying the chi-square test between state of loneliness felt and psychological wellbeing**

state of loneliness felt		psychological wellbeing		$\chi^2$	p
		positive affect	negative affect		
low	frequency	6	1	16.96	0.001
	expected frequency	1.9	5.1		
	difference	4.1	-4.1		
moderate	frequency	2	11	16.96	p<0.05
	expected frequency	3.5	9.5		
	difference	-1.5	1.5		
severe	frequency	0	10	16.96	p<0.05
	expected frequency	2.7	7.3		
	difference	-2.7	2.7		

Depression, along with the anxiety have a relatively high frequency among the lonely people. Depression is manifested by persistent sadness, feelings of discouragement, excessive worry, restlessness, insomnia, inability to concentrate. Anxiety involves motor tension, hyperactivity autonomous exaggerated fear and caution. These mental disorders are accompanied by the desire of self-isolation and loneliness and solitude along with the existence of chronic mental illness or other previous attempts may lead to suicide attempts.

The data presented in table 4, obtained by applying the t test of significance, shows that in the group of subjects who feel often loneliness, there is a tendency toward moderate depression (m = 22.43), while in the group of subjects who rarely feel loneliness is manifested predominantly a slight change of mood.

**Table 4 Presentation obtained results with the test t for depression**

Study Subjects	N	Minimum	Maximum	Average	Standard deviation	T	p
Subjects who often feel loneliness	260	19.58	25.29	22.43	7.641	16.080	p=0.001 (p<0.05)
Subjects who rarely feel loneliness	260	10.90	13.64	12.27	3.667		

Data obtained by applying the Pearson correlation coefficient, shown in table 5, show a positive correlation between the state of loneliness felt by subjects and depressed mood (  $p = 0.800$  ), meaning that if subjects felt more acutely state of loneliness, when changes occur



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more frequently dispositional states, an idea which supports the second hypothesis of the study, that “the subjects who often feel loneliness present a higher level of depression”.

**Table 5. Presenting data obtained by applying the Pearson correlation coefficient between the state of loneliness felt and depressed mood**

		state of loneliness felt	depression
state of loneliness felt	Pearson Correlation	1	.800**
	Sig. (2-tailed)		.000
	N	260	260
depression	Pearson Correlation	.800**	1
	Sig. (2-tailed)	.000	
	N	260	260

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

The data in table 6 obtained by applying the t test of significance, shows that in the group of subjects who often feel loneliness, there is a tendency towards a moderate anxiety ( $m = 19.87$ ), while in the group of subjects who rarely feel loneliness is manifested predominantly anxiety levels considered to be within normal limits.

**Table 6. Presentation obtained results with the test t for anxiety**

Study Subjects	N	Minimum	Maximum	Average	Standard deviation	T	p
Subjects who often feel loneliness	260	17.99	21.74	19.87	5.022		p=0.001 21.668
Subjects who rarely feel loneliness	260	12.86	14.27	13.57	1.888		

The data obtained by applying the Pearson correlation coefficient, presented in table 7, highlight a positive correlation between the loneliness felt by subjects and the state of anxiety ( $p = 0.791$ ), meaning that if the subjects felt more acutely the state of loneliness, then presents the most common manifestations of anxiety, the idea that supports the third hypothesis of the study, according to which: “the subjects who often feel loneliness present a higher level of anxiety”.

**Table 7. Presenting data obtained by applying the Pearson correlation coefficient between the state of loneliness felt and anxiety mood**

	state of loneliness felt		anxiety
state of loneliness felt	Pearson Correlation	1	.791**
	Sig. (2-tailed)		.000
	N	260	260
anxiety	Pearson Correlation	.791**	1
	Sig. (2-tailed)	.000	
	N	260	260

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

There were significant differences between the two groups of subjects regarding self-perceived satisfaction on his own life. Therefore, the hypothesis "loneliness affects satisfaction with life" was confirmed.

Based on data obtained through the application of Beck Depression Inventory were seen noticeable differences between the two groups of subjects with regard to the condition of depression felt. The second hypothesis of the study, “the subjects who often feel loneliness present a higher level of depression” was confirmed.

By applying the Hamilton Anxiety Scale, we obtained significant differences between the two groups of subjects on the anxiety felt. In addition, the third hypothesis of the study, according to which “the subjects who often feel loneliness present a higher level of anxiety” was confirmed.

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### 5. Conclusions and discussions

All three hypotheses that have given rise to the scientific approach have been confirmed, demonstrating the psychological and social effects of the loneliness felt on satisfaction with life.

Analysis of quality of life and the phenomena of social life, human relations, outline a possible understanding of what is happening, shares of knowledge that can be complemented by measures of social intervention. It takes a comprehensive perspective on the phenomena of Romanian society, aiming forms of activation, integration in psychosocial support groups, actions to reduce discrimination, (auto) and exclusion (self) social marginalization, and the effects of loneliness, rightly considered a true " soul sickness " through an articulated system that involves both representatives of informal system and system of public and civil society.

In recent years, the issue of social isolation and loneliness has garnered increased attention from researchers, policymakers, and the public as societies age, the use of technology increases, and concerns about the impact of loneliness on health grow. Worldwide, according to the obtained results by research conducted by Kaiser Family Foundation – The Economist Survey on Loneliness and Social Isolation in the U.S, U.K. and Japan, more than a fifth of adults in the U.S. and the U.K. say they often or always feel lonely, feel that they lack companionship, feel left out, or feel isolated from others, about twice the share in Japan, referred to here as those reporting loneliness or social isolation. Not everyone experiences loneliness and social isolation the same way and some do not see it as a problem for them; however, most of those reporting loneliness across the U.S., the U.K., and Japan do. About one in twenty across countries say their loneliness is a “major” problem for them. The major consequences of loneliness affect physical and mental health, relationship and work, good mood condition, trust in one’s own person and others, the optimism of life and future plans, in a word, the quality of life (KaiserFamFound, The Economist Survey on Loneliness and Social Isolation in the U.S, U.K. and Japan).

Loneliness during the pandemic was a complex and multifactorial issue that affected people across the globe. Its consequences, both psychological and physical, underscore the need for immediate intervention and long-term structural changes to address social isolation. As society moves forward in the wake of the pandemic, it is crucial that we develop policies, systems, and programs that prioritize the mental and social health of individuals, particularly during times of crisis. By fostering connection, resilience, and support networks, we can work to mitigate the adverse effects of loneliness and improve the overall well-being of affected populations.

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## ORIGINAL PAPER

# The role of personal advisors in the Romanian Parliament

Radu Cupcea<sup>1)</sup>

**Abstract:**

This article discusses the role played by the personal political advisors of Romanian deputies and senators in the law-making process, attempting to create a socio-professional profile of the people employed in parliamentary offices and to examine how the recruitment of this type of staff paid from the state budget is organized.

The article uses a methodology based on qualitative and content analysis of semi-structured interviews with former and current personal parliamentary political advisors. The first findings we made show that the majority of personal consultants have higher education, most of them in the field of social sciences. They play a low role in terms of legislative proposals, but have an increasingly significant contribution in terms of carrying out managerial and political communication tasks. Their influence on parliamentarians' decisions is low, and Romanian politicians are still not using them to their full capacity.

**Keywords:** *personal advisors, policy advice, Chamber of Deputies, Senate, parliamentary offices.*

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## The role of personal advisors in the Romanian Parliament

### Introduction

Through the acts issued by the provisional revolutionary power, Romania returned to the bicameral parliamentary system after 1989. The new Constitution approved by referendum in 1991 and revised in 2003 assigned the Parliament the role of a basic body of the multi-party democratic regime (Olimid, 2009). In the process of transition towards democracy, inspired by the models of consolidated democracies in Western Europe, Romanian parliamentarians have turned to the services of advisors to assist them in their work. In 2006, parliamentary offices and the position of councillors within them were officially established after the adoption of the Law on the Status of Deputies and Senators (Romanian Senate, 2006). The purpose of the law was to clearly regulate the parameters within which the activity of parliamentarians should fall. There was also a delimitation of the boundaries between the activity of political advisors and permanently employed civil servants within parliamentary groups or specialized committees in the Romanian Parliament.

The draft legislation, which is still in force today, contains an article with thirteen paragraphs dedicated to parliamentary offices. The first paragraph provides for the allocation of a sum established by the decision of the joint permanent bureaus of the two Chambers of Parliament, depending on budgetary resources, but “not less than one and a half gross salaries of the deputy, respectively of the senator” (Romanian Senate, 2006), so that members of the legislature can pay their advisors transparently. The law obliges parliamentarians to establish these offices in the constituencies where they were elected, except for deputies representing national minorities and those representing Romanians residing outside Romania. Thus, Romania too saw the establishment of these small institutions called parliamentary offices - which in the United States of America, for example, officially date from 1920, and in France from 1975.

The habit of carrying out parliamentary political activities with the help of political consultants has constantly developed in Romania since that time, but it is far behind France, Great Britain or the United States of America. During this time, some MPs understood that hiring at parliamentary offices can make their work much easier and sought to hire staff trained for this purpose, but there were also those who chose to violate Article 38, paragraph (11) of the law, which provides that: “members of the deputy's or senator's family or relatives/in-laws up to the third degree may not be employed at his parliamentary office” (*Ibid.*). Thus, since 2010, when an online press publication in Romanian first wrote about a phenomenon of hiring relatives at the offices of parliamentarians (Ziare.com, 2010), we have witnessed numerous violations of the law. An illegal practice has been instituted, and it has been present in every legislature. In many cases, MPs lost court trials against the National Integrity Agency and were declared incompatible with holding a public office for a period of time. The involvement of civil society, the media and external institutions has led to a limitation of this practice on the part of some officials.

The greatest pressure for the development of Romanian democracy and the reform of Romanian institutions was exerted by the European Union. Romania had to harmonize its national legislation with EU law and carry out a wide-ranging administrative reform before joining the EU in 2007 (Hintea et al, 2002 *apud*. Cobârzan: 295). Thus, besides the reforms related to the local administration, such as ensuring the decentralization of power, Romanian politicians also adopted a series of draft laws imitating the practice of their Western European counterparts. The practice of appointing special government advisers began in 1998, when the Christian Democrat government

promulgated a government ordinance that institutionalized a support structure for ministers, called the cabinet of dignitaries. Subsequently, legislation establishing a support structure for parliamentarians was adopted, as it already existed in France (since 1975), Spain (since 1997), Portugal (since 2003), and in the European Parliament (after 1992). The European Parliament pays 4060 parliamentary assistants. As little analysis has been undertaken in Romania on the role of parliamentary advisors in political life, the purpose of this article is to create a socio-professional profile of the personal political advisor, to describe the recruitment of these people, to investigate their loyalty to political parties and to assess the role they play in the lawmaking process.

### **Research method**

Taking into account the fact that the activity of personal political advisors is not transparent, and the Romanian Parliament does not make available to the public data about the persons employed in the parliamentary offices, which are considered sensitive information by the parliamentarians, I had to resort to qualitative research methods, namely the qualitative observation method and the semi-structured interview method. The systematic qualitative observation occurred within the Chamber of Deputies during the last two legislatures, between December 2016 and December 2024. Specifically, I analysed the interaction between the deputies of the largest parliamentary groups and their personal political advisors (around ten interactions). I conducted twelve semi-structured interviews with personal advisors from three parliamentary groups, selected according to their level of representativeness. Specifically, both male and female counsellors, junior counsellors, as well as highly experienced professionals answered the questions.

The attitude of the deputy towards his/her personal political advisor, the level of education of the advisor, the way he/she knew his/her employer and was employed, the loyalty towards the employer and the party, the political ambitions of the advisors, all have been tested in interviews and have helped to understand and highlight the general trends in this activity. The data were collected and processed in accordance with the respondent protection requirements, with research tools adapted to the functioning of the Romanian Parliament. In order to obtain the most relevant information, I chose to conduct the interviews as informally as possible, notifying the interviewed advisors from the start that the audio recordings and their names will not be made public, in order to encourage them to respond as honestly as possible during the interview.

Although I managed to obtain the approximate number of counsellors employed at the parliamentary offices, I did not resort to quantitative analysis because in the absence of a solid database including all the personal parliamentary counsellors, it is almost impossible to apply this research method. Consequently, I assume the methodological limitation and the loopholes that this research contains. I do not claim for a moment a high degree of exhaustiveness of the research, but on the contrary, I consider it only an initial work, which can be the basis of much more elaborate analyses.

### **Who are the personal political advisors?**

The counsellor is a person who gives advice. In the New Explanatory Dictionary of the Romanian language, the term *counsellor* designates a “person by whom a country leader is advised in leadership matters; an advisor.” (NODEX, 2002). Counsellors, depending on the politicians they work for, can be presidential, governmental or parliamentary political advisors. People who carry out this activity are also called personal advisors, political consultants, collaborators or assistants. Parliamentary advisors are



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assistants to deputies or senators, to whom they offer advice and support, usually of a political nature. Their appointment is essentially a “trust-based appointment” and lasts as long as the respective MP holds that office (James, 2007:8). There are specialized articles that define the person politically appointed by the parliamentarian or minister as a “temporary public official appointed to provide partisan advice..., who is exempt from the requirements of political impartiality that apply to permanent bureaucracy” (Shaw, Eichba, 2018:3). The reason why we do not find in the literature a definition exclusively dedicated to parliamentary political advisors is that most studies in the field of political science or administrative science have focused on the work of political advisors attached to ministers. After all, the parliamentarians' personal advisors have almost the same activities as their colleagues in the government, only they work with a deputy or a senator. As Bernadette Connaughton (2010, 2015) argued, politically appointed staff perform four main types of functions: they are either experts, partisans, coordinators or carers. The work of the political advisors from the parliamentary offices in Romania includes a wide range of activities, from political advice, partisan strategy, initiation of legislative projects to administrative and public communication roles. The parliamentarians' personal advisers are distinguished from the administrative staff by the fact that they are accountable only to the political decision-maker, have flexible working hours and a limited employment contract. The partisan nature of their work and the anonymity under which they work most of the time caused the public to regard them with suspicion. “As advisors, their purpose is to serve the needs of elected officials rather than the public. They assist them in carrying out their parliamentary and ministerial activities, lightening the workload of the chosen elites. However, they must also act as a bridge between elected officials and other agents such as civil servants, media and citizens” (Snagovsky, Taflaga, & Kerby, *quoted work*). Nowadays, each parliamentarian tends to create his own “small political enterprise” by recruiting personal advisors revolving around him for a four-year term. In December 2024, 923 personal advisors were employed in the deputies' parliamentary offices (Chamber of Deputies, 2025), and 95 personal advisors were employed by senators' offices (Senate of Romania, 2025b). These micro teams set up around each parliamentarian are no longer limited to female staff dedicated to transcription and secretarial tasks. The persons who are included in them nowadays must know how to post on social networks, to draw up answers for television shows, to write political statements, to initiate interpellations against the Government, to be able to draft a legislative initiative or to organize a political event. As MPs have become more and more overwhelmed by their current duties or simply grown more comfortable, their advisers have become more and more professional.

In Romania, according to the observations I made in the more than ten years in which I worked in three parliamentary offices, the recruitment profiles have changed, the work has been reorganized, the sectors of activity have diversified, and the profession of parliamentary counsellor has become better known by the general public due to the specialized literature from the United States of America and Western Europe, and better promoted through internship programs; but it has remained as discreet as regards the names of those who practice it. Compared to parliamentary assistants in the West, who have created professional associations and trade unions, who are mobilizing for their status and have increasingly turned political counselling into a profession in itself (Fretel, Meimon, 2015:527), personal counsellors in Romania are each working for themselves. They are not organized in a professional association and there is no database that includes most of them. Their data is held by the Human Resources Departments of the Chamber of Deputies and the Senate, which are not obliged to make it public.

### Recruitment of personal advisors

The strategies used for the recruitment of personal advisors by the Presidents of the Romanian Senate have been studied for several years by Cătălin Raiu and Ionuț Ciprian Negoită. The study of the two authors, entitled *Bureaucratic Polarization: Balancing Merit and Trust in the Romanian Senate*, reveals that patronage and clientelism are models of weaknesses of a democratic regime and a professionalized state apparatus because the problem of both patronage and clientelism is that they lead to the recruitment of advisors with less experience and doubtful capabilities, which lowers the morale of senior officials and reduces the general expertise of the field in question (Etzioni-Halevy, 2024 *apud.* Raiu, Negoită, 2024:114). This phenomenon is manifested in most parliamentary offices, not just the Parliament's leadership. Usually, one or two personal advisors are hired for their qualities and training, and the others - based on support from the party. The reality is that the recruitment and organization of this type of personnel is discretionary. The interviews reinforced the hypothesis that most of the personal advisors of Romanian parliamentarians come either from a network of clientelism or from political parties. Recruitments based on internships or public competitions launched by MPs after they have been elected are rarer. "I was first a party member, an activist in the party, then I sought deputies or senators in order to be hired as a political adviser. The social capital mattered a lot, the relationships I managed to make within the party and, based on a recommendation, I was contacted by a deputy, I had an online interview, then I was hired". (N.T., personal counsellor with 6 years of experience).

Political activism therefore plays the role of a "trailblazer" for those who want such a career. Those who join the party and work politically become more likely to become personal advisors. They benefit from the clientele relations game between the candidate and his party, as they capitalize in a certain way on the work they have done in the election campaign. In other words, the recruitment of most of the parliamentarians' personal advisors begins before the politician takes office. First there is the establishment of a relationship of loyalty and mutual obligation, then comes employment in the parliamentary office. Out of the 12 analysed situations, in 6 cases the recruitment took place through the party, in another 3 cases it took place on the basis of a recommendation and in 3 cases it occurred following an internship or after the respective persons were noticed in the activity they had carried out previously. "During the internship, I was noticed by a person who held the position of parliamentarian and so I was employed for the first time in a parliamentary office. Subsequently, I continued from one mandate to another." (L.G., personal counsellor with 15 years of experience).

The most difficult step for personal advisors in the Romanian Parliament, as in the case of those in France or Italy, was to be hired for the first time. After a four-year contract, almost all of them continued with the same MP or were taken over by another. "It is a difficult world to penetrate, this world of ours, of political advisors. Do not understand that we take the chisel and the hammer, only that in this environment one enters in two ways: either you are noticed in the internship at the Parliament, or by the traditional way (here he meant - through the party)." (L.G., personal counsellor with 15 years of experience).

A first conclusion we can draw is that it is difficult to get into the network of parliamentary advisors because not everyone who wants to become a personal adviser has the needed relationships. Political circles are quite narrow. The largest party has about four deputies and two senators in an electoral constituency. Once hired, most advisors

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manage to maintain or climb the political hierarchy. “I was recruited to the Parliamentary Office by recommendation on my first employment, on a social case. Subsequently, following the development of relationships with other parliamentarians whom I helped with various services, I continued.” (C.V., personal counsellor with 12 years of experience)

It is easier for political decision-makers to recruit their advisors from the party activist networks, because they already have minimal knowledge of the position, they are often multi-positioned in the party and already know how to use their status for the best connection between the party and parliamentary activity. At the same time, the recruits from among the party members can be more loyal because they share an interest in the partisan game, they are loyal to the party. Instead, these recruitment practices affect the quality of the work of political representatives, because the parties do not necessarily attract the most qualified young people in terms of legal studies, finance, economics or parliamentary diplomatic practice. “Faced with the lack of a guarantee of professional, political and financial stability, personal advisors become dependent on the network of political clientelism to continue their work in different structures of public administration” (Raiu, Negoită, 2024:124). This was also confirmed when most of them stated that they wanted to run for a political or administrative position instead of becoming highly trained personal advisors.

### **Profile of personal advisors in the Romanian Parliament**

Being appointed by the parliamentarian, personal advisors do not need a specific specialization. They can be hired at a parliamentary office even if they do not have higher education, in the position of referent. However, most personal advisors in Romania have graduated from a university. From the data I was able to extract from interviews and from the observations I made, the personal consultants of parliamentarians from the three major parliamentary groups in the period 2016-2024 have higher education with a specialization in Social Sciences, Political and Communication Sciences, Legal Sciences or Engineering. The answers of the 12 personal advisors revealed a ratio of 10 to 2 in favour of those with studies in the Social Sciences. Their interest in this activity arose during college, and most of them got the job shortly after graduating from university. Most of them learned during their work in Parliament what they have to deliver to keep their employers satisfied. “Being a parliamentary collaborator is, in a way, one of the “great schools” of politics, in the sense that it is one of the places for accelerated and intensive acquisition of what can be called the “elective habitus” and also of a network likely to be activated later. In an almost daily and direct relationship with parliamentarians, between imitation and empowerment, the collaborator learns the political game with those who have made it a “profession of faith” (Fretel, Meimon, 2015:528).

The political belief of the personal advisors in the party from which the parliamentarian they serve comes is a strong one. Few would accept to work for an MP from an opposing party, especially those who obtained their position through the party. Personal counsellors who have been hired through a practice program, by recommendation, without the help of party networks, are much more willing to collaborate in the future with parliamentarians from other parties.

The age of the personal advisors in the Romanian Parliament is between 22 and 35 years. Basically, the position of personal parliamentary adviser represents the career debut of political advisors in Romania. In this position, they gain experience, develop clientele relationships and are willing to work for a much lower salary than advisors in the

Government or in the Presidential Administration. Their main concern is to get ahead and achieve some financial stability. Advancing for them means taking a position as a personal adviser to a minister, party or Chamber president. Some aim higher than that and dream to occupy a position of political adviser in the Presidential Administration or even to run for a political position. Those who come from parties have the desire to run for a deputy position, and the others aim to get a leadership position within the Government. The number of those who excluded any political office is small. Also, the number of those who put the interests of the electorate above the interest of the MP or the party is also small. In general, there is a rift between personal advisors and citizens. In addition to the fact that people working with parliamentarians are more concerned about their own interests and those of the party, they show a certain disregard for the electorate. To the question, "How do you perceive the electorate in Romania?", the advisors have labelled the voting public as: "disappointed", "unstable", "radical", "disengaged", "sloppy", "exposed to disinformation campaigns", "easy to handle", "melancholic towards the Ceausescu regime", "not guilty", "with rational vote", "weirdos", "comfortable", "uneducated", "shallow", "changeable", "kind of uneducated", "uninformed", "faithful to the parties", "unchanged", "pragmatic", "unreliable". In conclusion, citizens are not favourably looked upon by the parliamentarians' personal advisors. All, regardless of political colour, way they were recruited, age, gender or experience, have a rather negative impression of the citizens they have to serve and mobilize to vote. The only ones who were a little more lenient towards the voters were the personal councillors who visit more often in the constituency where their MP was initially elected. This shows that direct communication between voters and the MPs' personal advisors could lead to an improvement in trust between the two parties and, why not, to increased concern from the advisors for the needs of the citizens.

### **Role of personal advisors**

Within a parliamentary office we have two types of personal advisors: those who work from the Parliament headquarters and those in the territory, who work at the physical headquarters of the office. Those in Parliament deal with drafting legislation, formulating questions and interpellations addressed to ministers, writing political statements, managing the relationship with the media, participating in the work of specialized committees and other important meetings. The others remain limited to secretarial tasks – diary management, answering phone calls, contacts with the electoral district and especially correspondence – somehow assisting the members of the team in Bucharest. In many cases, the district councillors work at the headquarters of the branch of the party from which the MP who hired them comes. Their role and influence on the work of the parliamentarian is very small.

When ministerial advisers are studied, there are voices in the literature who argue that politically appointed personnel may even pose a threat to the impartiality of public office and the wider democratic order, because of the influence they hold (Dowding, Taflaga, 2020; Eichbaum, Shaw, 2008). Personal advisors can complicate lines of responsibility, and their presence can negatively alter the decisions of government actors.

In the case of political advisors in Parliament, this finding does not apply. Indeed, they monitor various important sectors such as social rights, defence, taxation and work with the parliamentarian to draft a bill or report (legislative work), but they remain rather limited in their decision. Their sector of intervention in relation to the everyday life of citizens is generally small. This is due to the low influence of parliamentarians, the

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Government legislating a lot through ordinances in Romania. Other explanations for their low influence are their youthfulness and timorous attitude. “There is no very well-developed consulting culture in our country and counsellors are not used at their true value. Parliamentarians who make good laws are helped by people in ministries.” (A.C., personal counsellor to senators, deputies and mayors, with over 8 years of experience). As can be inferred, personal advisors have acquired a special role in parliamentary life, but their influence on politics is still low. Asked if it often happens that decision makers disregard their advice and if it bothers them, most counsellors admitted that in most cases they are not listened to. At the same time, they were not bothered by this situation. “The political consultant must be the right hand of a dignitary. To explain the risks, the benefits, to put on the table two or three working options, to deal with a post, a press release. [...] The final decision must rest with the parliamentarian, because the responsibility and consequences are primarily his.” (V. A., personal adviser to deputies and ministers with 14 years of experience).

Although sometimes they function as real “shadows” – in times of representation and/or legislative work – of the deputy or senator, personal consultants are a fairly invisible staff in the decision-making process. They work in a central institution, in the parliamentary institution, vector of numerous political and partisan tasks, but they fail to overcome the status of assistants subject to the elected representatives who employ them. Specifically, we find that they are part-time officials, willing to prioritize the interests of their party over their own personal beliefs and to prioritize the party and personal ambitions over the opinions of voters.

### Conclusions

If the Romanian Parliament has reached such a low level of trust over the years, the trust of Romanians in the parliamentary institution being around 13% (ISPRI, 2022), this is also imputable to the personal advisers who work around the parliamentarians. Theoretically, they have the mission to facilitate the work of parliamentarians and improve their image in front of citizens. They also have the role to come up with legislative proposals, solutions to citizens' problems and PR actions. The counselling activity, whose functional, professional and political problems we have just shown, presents us with the image of young consultants, with socio-humanitarian rather than legal or economic studies, coming from inside the parties, with personal political ambitions and with low decision-making influence. As for their view of citizens, it is not positive or empathetic. All this data finally leads to a hypothesis that allows us to make the world of personal counsellors more well known. Even if parliamentary consultancy has no major influence, this activity is one of the rare theoretical and practical schools for the training of political auxiliaries, which can serve as a springboard to institutional functions (parliamentary administration, ministerial offices) or partisan (party or parliamentary candidatures) positions. In short, it is an almost mandatory rite of passage in order to enter a world of big politics.

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## ORIGINAL PAPER

# The Simple Perfect Indicative in the Romanian Language – Teaching and Evaluation

Ramona Șendrescu<sup>1)</sup>

### Abstract:

The Simple Perfect Indicative in the Romanian Language – Teaching and Evaluation is a research study conducted based on our didactic experience in teaching Romanian as a foreign language. It primarily focuses on the methods used to teach and evaluate the simple perfect indicative in Romanian for international students at the University of Craiova. This tense is not common in standard speech but is still actively used in contemporary speech in the southwestern part of Romania, particularly in Oltenia and in Craiova, the most important city in this region. Learning Romanian provides students with the opportunity to interact and engage with their peers in discussions, reflection exercises, self and peer review, and group work.

The findings from this study emphasize the effectiveness of integrating theoretical instruction with practical exercises, utilizing modern educational tools, and fostering an environment conducive to active learning and self-assessment. These practices are essential for achieving linguistic proficiency and ensuring the success of foreign students in mastering the Romanian language.

**Keywords:** *communication, teaching the Romanian language, international students, the simple perfect indicative, testing and evaluations.*

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To conduct this study, the research is based on teaching experience gained from the Preparatory Year of Romanian Language for Foreign Citizens program offered by the University of Craiova. This program aims to facilitate the acquisition of the Romanian language by international students, enabling them to pursue higher education studies in Romanian (The specific standards for the Preparatory Year of Romanian Language for Foreign Citizens, online: [https://www.aracis.ro/wpcontent/uploads/2019/07/Mari\\_Standarde\\_specifice\\_-\\_An\\_prega\\_titor\\_Maril.pdf](https://www.aracis.ro/wpcontent/uploads/2019/07/Mari_Standarde_specifice_-_An_prega_titor_Maril.pdf), accessed on January 9, 2025).

According to the curriculum, the courses are structured over an academic year and include both foundational subjects, such as Introduction to the Study of the Romanian Language and Romanian Culture and Civilization, as well as specialized courses. The specialized courses include:

- *Practical Romanian Language Course—Phonetics, Vocabulary, Grammatical Structures*
- *Practical Romanian Language Course—Oral and Written Communication*
- *Practical Romanian Language Course—Reception of Written and Oral Texts*
- *Practical Romanian Language Course—Writing and Composition.*

In addition, the program offers elective courses focused on specialized language for various fields, including mathematics and natural sciences, engineering sciences, biological and biomedical sciences, social sciences, humanities and arts, and sports science and physical education (The specific standards for the Preparatory Year of Romanian Language for Foreign Citizens: [https://www.aracis.ro/wpcontent/uploads/2019/07/Mari\\_Standarde\\_specifice\\_-\\_An\\_prega\\_titor\\_Maril.pdf](https://www.aracis.ro/wpcontent/uploads/2019/07/Mari_Standarde_specifice_-_An_prega_titor_Maril.pdf), accessed on January 9, 2025.) The Common European Framework of Reference for Languages (CEFR) sets certain requirements: to reach level B1, the student must surpass levels A1 (introductory or discovery) and A2 (intermediate or survival).

Our study aims to observe the progress made by students after completing exercises designed to master the correct use of the simple perfect indicative and to evaluate the knowledge they have acquired. The case study for the simple perfect tense was conducted during the 2024–2025 academic year, drawing on the experience of teaching Romanian to foreign students in the Preparatory Year of Romanian Language program. The study involved a group of 15 students—7 girls and 8 boys—comprising one student each from Saudi Arabia, Bulgaria, Macedonia, and Albania, three from Morocco, and eight from Serbia.

All students in the group participated in both the teaching and assessment phases. Notably, the eight Serbian students were able to communicate orally in Romanian at a dialectal level at the beginning of the academic year. However, none had attended schools where Romanian was the primary language of instruction, and their proficiency varied depending on how frequently they used dialectal Romanian within their families.

The proficiency in Romanian among these students is influenced by several factors, including the presence of Romanian-speaking communities in Serbia, the availability of Romanian language education, and the extent of language use within their family environments. This context explains why some students demonstrated oral communication skills in Romanian at a dialectal level despite lacking formal education in the language.

In teaching the simple perfect indicative, we utilized several Romanian language textbooks designed for foreign learners (Eleonora Olivia Bălănescu, 2017: 153; Cristina-Eugenia-Burtea-Cioroianu, 2019: 205).



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To prevent students from adopting a passive attitude during the theoretical presentation of situations where the simple perfect indicative is used, we combined traditional methods—such as didactic presentations (via PowerPoint), educational conversations, and demonstrations—with modern techniques like games and discovery-based learning. This approach renders theoretical concepts interactive and engaging, enhances practice, accelerates learning, and maintains students' attention for extended periods. By blending these traditional and modern methods, educators can create a dynamic and effective learning experience that caters to diverse student needs and learning styles.

The simple perfect indicative (*perfectul simplu*) in Romanian denotes actions completed in the past. According to the Grammar of the Romanian Language, the simple perfect indicative, a synthetic form composed of R (root) + F (inflection), has the most complex structure among the past tenses (Gramatica limbii române. 2005. vol. I. Cuvântul. București: Editura Academiei Române, p. 420.). Newer grammars (starting from the second half of the 20th century) consider that the position of this tense in the Romanian language has diminished significantly because, in its function of expressing a completed action, it is competed with and replaced in spoken language by the compound perfect. However, this is not the case in the literary system, where it appears consistently, occupying its natural place.

Its usage is predominantly observed in specific regional dialects, notably within Oltenia and parts of southwestern Romania. In contrast, standard Romanian typically favors the compound perfect tense (*perfectul compus*) for expressing past actions. The meaning of the simple perfect forms is similar to that of the compound perfect (Gramatica limbii române. 2005. vol. I. Cuvântul. București: Editura Academiei Române, p. 422.). The simple perfect indicative is rarely used in common speech in standard Romanian. In current speech, it is used regionally, in the southwestern part of Romania, in Oltenia (both in rural and urban areas), but also in Banat and western Muntenia (mostly in rural areas). Since it appears both in the spoken variant of the Romanian language and in literary and non-literary works from different periods of evolution, the simple perfect cannot be considered merely a regional tense.

To explain the use of the simple perfect tense in Oltenia, I have used both historical and linguistic arguments:

In Oltenia, one of the most intense and prolonged processes of Romanization took place, surpassing other regions conquered by the Romans north of the Danube and among the territories that would eventually form modern Romania. Oltenia was incorporated into the Roman Empire as early as 102 AD, following the conclusion of the First Dacian War, and the region did not experience the Aurelian withdrawal of 271–275 AD as acutely as other areas. This is because Roman dominion north of the Danube, particularly in the southern half of the Danube Plain, persisted for centuries through the Eastern Roman Empire.

The linguistic example pertains to the presence of the simple perfect tense in the Oltenian dialect, a feature that has been preserved almost identically to its form in Latin (*fui, fuisti, fuit, fuimus, fuistis, fuerunt* or *fuere*). This form has been perpetuated far more effectively over the centuries in Oltenia than in other regions of Romania. The verbal system is widely recognized as the cornerstone of any fully developed language, and the Romanian verbal system derives directly from Latin, particularly from the vulgar Latin spoken by colonists, irrespective of their origins within the empire. In the Oltenian dialect,

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the frequency of verbs, as well as their moods and tenses inherited from Latin, remains significantly higher compared to many other Romanian regions.

The forms of the simple perfect are made of the stem of the infinitive (unstressed, which leads to phonetic changes), a stressed suffix, that is different in each group of verbs, and the endings -i, -și, -Ø, -răm, -răți, -ră, which are the same for all the verbs:

sg.	1 <sup>st</sup>	<i>intra<b>i</b></i>	<i>tăcu<b>i</b></i>	<i>ceru<b>i</b></i>	<i>merse<b>i</b></i>	<i>dormi<b>i</b></i>	<i>coborâ<b>i</b></i>
	2 <sup>nd</sup>	<i>intra<b>și</b></i>	<i>tăcu<b>și</b></i>	<i>ceru<b>și</b></i>	<i>merse<b>și</b></i>	<i>dormi<b>și</b></i>	<i>coborâ<b>și</b></i>
	3 <sup>rd</sup>	<i>intra<b>ă</b></i>	<i>tăcu<b>ă</b></i>	<i>ceru<b>ă</b></i>	<i>merse<b>ă</b></i>	<i>dormi<b>ă</b></i>	<i>coborâ<b>ă</b></i>
pl.	1 <sup>st</sup>	<i>intra<b>răm</b></i>	<i>tăcu<b>răm</b></i>	<i>ceru<b>răm</b></i>	<i>merse<b>răm</b></i>	<i>dormi<b>răm</b></i>	<i>coborâ<b>răm</b></i>
	2 <sup>nd</sup>	<i>intra<b>răți</b></i>	<i>tăcu<b>răți</b></i>	<i>ceru<b>răți</b></i>	<i>merse<b>răți</b></i>	<i>dormi<b>răți</b></i>	<i>coborâ<b>răți</b></i>
	3 <sup>rd</sup>	<i>intra<b>ră</b></i>	<i>tăcu<b>ră</b></i>	<i>ceru<b>ră</b></i>	<i>merse<b>ră</b></i>	<i>dormi<b>ră</b></i>	<i>coborâ<b>ră</b></i>

In the Romanian language, the simple perfect is formed using suffixes:

- Verbs from the first conjugation in -a take the suffix -a- (that turns into -ă in the third person singular): a lucra - lucră; a alerga - alergă; The verbs in -a with the stem ending in a vowel (except -u) take the suffix -e in the third person singular: a se apropia - se apropie; a copia - copie; a studia - studie; a întârzia-întârzie.

- verbs from the second conjugation in -ea take the suffix -u- verbs in -i (the fourth conjugation) take the suffix -i- verbs in -i (the fourth conjugation) take the suffix -d- (-i-);

- verbs from the third conjugation in -e form the simple perfect with the suffix -u- (the verbs that form the past participle in -ut) or with the suffix -se- (the verbs that form the past participle in -s). Before the suffix -se- the final consonant of the stem may disappear (a prinde -prinsei, prinseși, prinse, etc.) or change into a different consonant (a frige - fripsei, fripseși, fripse, etc.). The emphasis falls on the final vowel of the verb stem, except for the verbs in the third conjugation, with participles ending in –s or –t, which have the stress on the penultimate syllable of the stem: merséi, merséși, dar mersé, merserăm, merserăți, merseră; rupséi, rupséși, dar rúpse, rúpserăm, rúpserăți, rúpseră.

The simple perfect of the verbs a fi (to be) and a avea (to have) is limited to one form, the second being regional:

<i>a fi</i>	<i>a avea</i>
<i>fui / fusei</i>	<i>avui / avusei</i>
<i>fuși / fuseși</i>	<i>avuși / avuseși</i>
<i>fu / fuse</i>	<i>avu / avuse</i>
<i>furăm / fuserăm</i>	<i>avurăm / avuserăm</i>
<i>furăți / fuserăți</i>	<i>avurăți / avuserăți</i>
<i>fură / fuseră</i>	<i>avură / avuseră</i>

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In the Dicționarul ortografic, ortoepic și morfologic al limbii române (DOOM3), Editura Univers Enciclopedic, Gold, 2021, the form "fusei" is eliminated, and only the form "fui" remains.

In the Dicționarul ortografic, ortoepic și morfologic al limbii române (DOOM3), Editura Univers Enciclopedic, Gold, 2021, the form "avusei" is eliminated, and only the form "avui" remains.

The simple perfect of other irregular verbs is:

<i>a da</i> to give	<i>a lua</i> to take	<i>a sta</i> to stay	<i>a bea</i> to drink	<i>a vrea</i> to want	<i>a ști</i> to know
<i>dădui</i>	<i>luai</i>	<i>stătui</i>	<i>băui</i>	<i>vrui</i>	<i>știui</i>
<i>dăduși</i>	<i>luași</i>	<i>stătuși</i>	<i>băuși</i>	<i>vruși</i>	<i>știuși</i>
<i>dădu</i>	<i>luă</i>	<i>stătu</i>	<i>bău</i>	<i>vrui</i>	<i>știu</i>
<i>dădurăm</i>	<i>luarăm</i>	<i>stăturăm</i>	<i>băurăm</i>	<i>vrurăm</i>	<i>știurăm</i>
<i>dădurăți</i>	<i>luarăți</i>	<i>stăturăți</i>	<i>băurăți</i>	<i>vrurăți</i>	<i>știurăți</i>
<i>dădură</i>	<i>luară</i>	<i>stătură</i>	<i>băură</i>	<i>vrură</i>	<i>știură</i>

Difficulties for foreign students arise in:

- In the third person singular, many verbs with the infinitive ending in -a have a simple perfect form that is identical in writing to the present form. In pronunciation, the forms are differentiated by accent: (el) ascultă (present) vs (el) ascultă (simple perfect). Usually, the context (of present or past) helps in recognizing the form.

- At the third person singular, many verbs with an infinitive ending in -a have a simple past tense form identical in writing to the present tense form. In speech, the forms are differentiated by stress: (he) listens (ascultă - present) vs. (he) listened (ascultă - simple past). Usually, the context (present or past) helps in identifying the correct form.

- The first person singular and third person singular forms of verbs with an infinitive ending in -i pose orthographic challenges because their endings are identical or nearly identical in pronunciation (a full i sound). Only recognizing the grammatical form allows for correct spelling: with -ii for the first-person singular (the first -i- shared with the infinitive suffix, the second -i- being the first person singular ending) and with -i for the third person singular. Correct spelling can be verified by comparison with verbs from another conjugation class: (I) eu fugi+-i is structured similarly to (I) eu pleca+-i, while (III m.) el fugi+Ø corresponds to (III m.) el plecă+Ø.

After teaching the theoretical part and learning the rule for forming this tense, consolidation followed through practical exercises such as conjugating verbs in the simple past tense, creating sentences with these verbs, and composing short texts that include verbs in this type of past tense. To reinforce the theoretical concepts, we use various types of exercises (substitution, transformation, etc.) aimed at practicing and automating the grammatical phenomenon.

Following the knowledge consolidation stage through various exercises, we observed that several mistakes appeared among some foreign students:

- Confusing perfect simple with present because in writing, the perfect simple and present tense can look identical;

- Incorrect conjugation of irregular verbs because irregular verbs like a da (to give) or a sta (to stay) follow distinct conjugation patterns that differ significantly from regular verbs;

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- Adding extra "i" to endings because the extra "i" is sometimes mistakenly added due to confusion with the rules for other tenses.

After each teaching lesson, I propose a test to the students to assess the degree of assimilation of the newly acquired notion. Thus, for them, evaluation is neither a surprise nor an ad-hoc event but simply a part of the learning process. The test was conducted on the Google Classroom platform. Students were required to use the new grammar knowledge and integrate it into sentences and phrases.

An online test was used in the form of a Quiz with Multiple Choice Questions, featuring three options and only one correct answer. I advocated for this format because it provides feedback through automatic grading, including the correct answers. This testing method requires increased attention from the students. The probability of guessing the correct answer is relatively low. The time limit for completing the 10 items was set at 10 minutes.

One of the advantages of these Quiz tests is that they are short and easy to grade, and another is that the order of the questions and the options can be shuffled, making the test unique for each student.

The test proposed on *Google Classroom*:

<p><b>Puneți verbele la timpul perfect simplu:</b> <b>Precizare: Numai un răspuns este corect!</b></p> <p><b>1.</b>      <i>Indicați seria în care toate verbele sunt la modul indicativ, timpul perfect simplu, persoana I, numărul singular:</i></p> <p>a)      alergă, citea, scriam b)      alergai, suii, citii c)      fusei, tăceam, citiră</p> <p><b>2.</b>      <i>Cum ..... cursul la care voi ..... azi?</i></p> <p>a)      fuse, merserăți b)      a fost, ați mers c)      fuseră, merseră</p> <p><b>3.</b>      <i>Îți .....mâncarea de la restaurant?</i></p> <p>a)      răspunsei b)      plăcu c)      citii</p> <p><b>4.</b>      <i>Când .....de la universitate, Maria ..... un telefon mamei.</i></p> <p>a)      a venit, a dat b)      veni, dădu c)      venii, dădui</p> <p><b>5.</b>      <i>Voi .....cheile?</i></p> <p>a)      ați văzut b)      văzură c)      văzurăți</p>	<p><b>6.</b>      <i>Mie ..... că ciocolata ..... prea dulce.</i></p> <p>a)      nu mi se păru, fu b)      nu mi s-a părut, a fost c)      nu i se părea, ar fi fost</p> <p><b>7.</b>      <i>Când ..... după o oră, nu .....nimic.</i></p> <p>a)      dormii, luă b)      mă trezii, îmi amintii c)      m-am trezit, am mâncat</p> <p><b>8.</b>      <i>Când el..... la cursul de limba română, eu .... acasă.</i></p> <p>a)      a venit, am plecat b)      venii, plecai c)      veni, plecai</p> <p><b>9.</b>      <i>Mă întreb cu cine ..... (a sta de vorbă) atât. Te ..... (a suna) și ..... (a nu putea) să dau de tine.</i></p> <p>a)      stătuși de vorbă; sunai; nu putui b)      ai stat de vorbă; am sunat; nu am putut; c)      stătură, sunară, nu putură</p> <p><b>10.</b>      <i>Voi acum vă ..... de la universitate?</i></p> <p>a)      întorsei b)      întoarseră c)      întoarserăți</p>
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## **The Simple Perfect Indicative in the Romanian Language – Teaching and Evaluation**

Students were encouraged to engage in critical thinking, reasoning, logic, and deductive processes during the test. They could review their incorrect answers and correct themselves. Thus, each student could achieve a maximum score of 100 points for completing the test.

This online test was merely a learning tool for self-assessment, with no consideration given to the grades or points accumulated.

Out of the 15 students who participated in the online test, 6 achieved the maximum score of 100 points, 3 scored 90 points, 3 scored 80 points, and 3 scored 70 points.

The implementation of accurate and equitable evaluation practices, coupled with the timely dissemination of results to students, constitutes a fundamental aspect of the educational process, irrespective of the instructional format. A notable advantage of this testing methodology lies in its capacity to facilitate the interpretation and analysis of data by educators with greater ease and efficiency. Furthermore, the provision of rapid feedback enhances the student experience by transforming online assessments into interactive and engaging activities, resembling games rather than conventional exercises.

### **Conclusions**

This study, grounded in the teaching experiences of the Preparatory Year of Romanian Language for Foreign Citizens program at the University of Craiova, highlights the complexity of teaching and evaluating the use of the simple perfect indicative tense to international students. Several key observations and conclusions can be drawn from the findings:

1. The teaching and evaluation process underscored the progress students made in acquiring the grammatical structures of the simple perfect indicative. However, certain difficulties persisted, particularly for non-native speakers unfamiliar with the linguistic nuances of Romanian. These challenges included: confusion between the simple perfect and present tenses, due to orthographic similarities; errors in conjugating irregular verbs, which follow distinct patterns not encountered in regular conjugations and orthographic issues, such as the incorrect addition of an extra "i" in specific forms.
2. The linguistic background of the students, particularly those from Serbian-speaking regions with exposure to dialectal Romanian, played a significant role in their learning trajectory. While these students exhibited oral communication skills at a dialectal level, their formal grammatical proficiency required targeted interventions. The study emphasizes the need for culturally informed teaching approaches that account for the diverse linguistic contexts of learners.
3. The integration of traditional teaching methods with modern, interactive techniques proved beneficial. Combining didactic presentations, demonstrations, and discovery-based learning fostered engagement and comprehension. The use of games and contextually rich exercises was particularly effective in maintaining student interest and promoting active learning.
4. The implementation of online assessments through platforms like Google Classroom offered several advantages:
  - The structured format of multiple-choice quizzes provided a clear and standardized evaluation framework.
  - Automated grading and rapid feedback enabled students to identify and correct their errors promptly, reinforcing learning outcomes.

- The customizable nature of online tests ensured fairness and minimized opportunities for rote memorization or guessing.

5. The results of the online test demonstrated varying levels of proficiency among the students. While six students achieved the maximum score of 100 points, others scored 90, 80, or 70 points. This distribution highlights the importance of personalized feedback and continuous practice to address individual learning gaps.

The study reaffirms the importance of applying fair, transparent, and error-free evaluation practices. The timely delivery of results not only supports the learning process but also transforms assessments into interactive and engaging activities. Moreover, the ease of data analysis provided by online testing platforms allows educators to adapt their teaching strategies to better meet student needs.

In conclusion, the findings from this study underline the effectiveness of integrating theoretical instruction with practical exercises, leveraging modern educational tools, and fostering an environment conducive to active learning and self-assessment. These practices are essential for achieving linguistic proficiency and ensuring the success of foreign students in mastering the Romanian language.

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## ORIGINAL PAPER

# *Acfatmire* and *De Terra Commendata* (Linguistic and Juridical Analyses)

Irina Gvelesiani<sup>1)</sup>

### Abstract:

The Franks were divided into two large tribes, the Salian and the Ripuarian. Both of them compiled the laws - *Pacius Legis Salicae* / *Lex Salica* and *Lex Ribuarria* / *Lex Ripuarria*. Despite the existing belief that “the barbarian laws are not unadulterated Germanic custom” (Murray, 1983 : 117), they give us a glimpse of the early Germanic institutions rooted in the tribal past (Rivers, 1986 : 1-2). Some scholars (Holmes, Holdsworth, Frankel, Helmholtz, etc.) suppose that *Pacius Legis Salicae* influenced the development of British law. They put special accent on the three-party ceremony of adoption - *acfatmire* - and its obvious impact on the formation of the common law *trust*.

The present paper discusses the juridical-linguistic peculiarities of the Salians’ *acfatmire* and the Ripuarians’ *adfatimire* as well as their similarity with the British entrusting relationships. Moreover, special attention is paid to Article 65c, which is differently numbered and entitled (*De terra co (n) demnata*, *De terra commendata*, *De terra condemnata*, *De terra condemnata*) in several manuscripts of *Lex Salica*. The study of the existing data, manuscript materials and appropriate word-entries of the dictionaries reveals that the word *commendata* is a verbal realization of the concept of *entrustment*. Moreover, the transfer of ancestral land depicted in Article 65c is comparable with the earliest entrusting relationships that existed in the times of the Crusades. Accordingly, the research proposes the innovative attitude towards the origin of the common law *trust* via depicting the connection between the *commendata* and the trusted administration of property.

**Keywords:** *commendata*, *Lex Ripuarria*, *Lex Salica*, *the Franks*, *trust*.

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### The General Introduction

Originally, the Franks were the confederation of the peoples, who spoke the Germanic language and who lived north and east of the northernmost part of the Rhine frontier of the Roman Empire. In the third century, the Franks took part in the barbarian raids on the Empire and the Roman Emperors led several campaigns against them. In the mid-fourth century, some of the Franks settled within the Empire. Later they appeared in several sources as the Romans' allies. The first historical source, which was actually written by a Frank, was *Pacius Legis Salicae* (James, 1988 : 6-7) or *Lex Salica*.

It is generally believed that *Lex Salica* is the most influential barbarian law. It is usually treated as an important Late Antique legal text, which was composed in Gaul, in Latin, shortly after the end of the Western Roman Empire (Palmer, 2018 : 271–272).

The researchers express different viewpoints regarding the date of the creation of *Lex Salica*. It is believed that the earliest version occurred in the middle of the 4<sup>th</sup> century (Dierkens & Périn, 2003 : 167). However, it seems more obvious that the oldest redaction - *Pacius Legis Salicae* i.e. the Pact (or Agreement) of the Salic law(s) comprised 65 legal titles and was created during the latter years of Clovis' reign (507-511). Two later Merovingian kings - Theuderic I (511-533) and Guntramn (561-592) - slightly modified the first redaction and the 65-title text received the additional laws in the 6<sup>th</sup> century. The first redaction was followed by the second (comprising 100 titles) and third redactions containing respectively 100 and 70 titles (Rivers, 1986 : 3).

“*Lex Salica* is preserved in about eight manuscripts, ranging in date from the latter half of the eighth century to the sixteenth century. The majority of them - about sixty - belong to the late Carolingian redaction” (Murray, 1983 :122). Some of them were recopied in the fifteenth and sixteenth centuries (Kremer & Schwab, 2018 : 241).

It is important that *Lex Salica* became the basis of the law of the Riparian Franks (*Lex Ribuaria*). The latter represents an updated version for the Frankish people in the Rhineland area (around Cologne), omitting all the statutes for the Roman people included in *Lex Salica*. King Dagobert was probably responsible for the composition of this ancient law whose origins date back to the first half of the seventh century. The *Lex* is preserved in 52 manuscripts, written between the ninth and eleventh centuries, as well as in the sixteenth century (Kremer & Schwab, 2018 : 241).

The Salic laws are characterized by the addition of several vernacular (Frankish) terms and phrases, which are interpolated within the Latin text as the Malberg glosses. They were intended to highlight and clarify the Latin text. However, only a few manuscripts contain these glosses (Rivers, 1986 : 6). Some of the words, owing to the mistranscription, are puzzles for the philological science (Pollock & Maitland, 2013 :7). Moreover, the glosses of *Lex Salica* of the early sixth century consist of the Germanic words that are hopelessly distorted (Keller, 1964 : 116). Additionally, the Frankish is corrupt – apparently because the scribes, who made copies of the laws, did not understand what they were reading (Rivers, 1986 : 6). “The recording of the unwritten laws was carried out with a substantial assistance of the Gallo-Roman jurists trained in the traditions of Roman law” (Gvelesiani, 2023 : 72).

Some scholars (Holmes, Holdsworth, Frankel, Helmholz, Zimmerman, etc.) suppose that *Pacius Legis Salicae* influenced the development of British law. They put special accents on the three-party ceremony of adoption - *acfatmire* - and its obvious impact on the formation of the common law *trust*. The present paper discusses the juridical-linguistic peculiarities of the Salians' *acfatmire* and the Ripuarians' *adfatmire*,

as well as their similarity with the British entrusting relationships. Moreover, special attention is paid to Article 65c, which is differently numbered and entitled (*De terra co (n) demnata, De terra commendata, De terra condempnata, De terra condemnata, De terra condemnata*) in several manuscripts of *Lex Salica*. However, before starting the discussion, let us focus on the major peculiarities of the *trust*.

### The Common Law Trust

The *trust* as a legal institution originated in common law of the Middle Ages. It is characterized by a versatile, flexible nature and entails a three-party relationship, which consists of a donor/trustor/settler, a trustee and a beneficiary. A donor arranges with a trustee to divide a donee's interest between a trustee and a beneficiary (Langbein, 1995 : 632). The *trust* is characterized by bifurcation: a trustee holds a *legal title* to trust assets and a beneficiary has an *equitable* or *beneficial ownership*. This separation of legal and beneficial ownerships offers many advantages. Accordingly, the *trust* can be treated as a powerful tool for implementing a donor's freedom of disposition (Sitkoff, 2014 : 658).

As a result of such bifurcation of rights, a trustee is obliged to manage transferred assets, while a beneficiary enjoys benefits. Accordingly, a legal right on assets belongs to a trustee, while an equitable right is owned by a beneficiary. Moreover, every valid *trust* meets three certainties – intention to form the *trust* is certain; identity of a trust property is defined; identity of a beneficiary is also defined (Tang, 2015 : 2).

Therefore, the *trust* consists of the following main elements:

- *donor/settler/ trustor* – a creator of the *trust*;
- *trustee* – a legal entity or a physical person that holds a legal title to a *trust property*;
- *beneficiary* – an equitable owner of a *trust property*.

The scholars interested in the common law *trust* often raise the question of its origin. It is believed that the *trust* originated from the medieval *use*, which had been connected with the Crusades of the 12<sup>th</sup> and 13<sup>th</sup> centuries (Sulçe, 2015 : 221). Before the Crusader knights (landowners) departed to the Holy Land, their majority entered into agreements with friends as well as relatives to care for their lands/estates while they were gone (Beijer, 2018 : 134-135). As a result, the *use/use of land* was created. It became a method of controlling an individual's property after his death and of ensuring that it could pass to somebody other than an heir. Another advantage of the *use* was that it could assist in the avoidance of payment of feudal incidents (Kerridge, 2011 : 432–471). Similarly to the *trust*, the *use* was a three-party relationship consisting of three major elements:

- *feoffor* – a transferor;
- *cestui que use* – an owner of transferred assets;
- *feoffee to use* – a transferee that held transferred assets to the use of *cestui que use*.

Some scholars connect the origin of the *use* with the legal institution *Salman* that dates back to *Lex Salica*. Holmes and Holdsworth expressed their influential opinions in this respect. Holdsworth considered that this was the true origin of the *trust/use* and was applied to grants of land in the early period after the Conquest. Holmes also traced the *use* to the Germanic *Treuhand*, or *Salman*, who was an executor in early times. Assets had been transferred to the *Salman* for certain purposes and he took a recognized position in administration of a deceased's personal property (Potter's, 1958 : 604-605). Moreover, the *Salman* permitted a transferor to adopt or appoint an heir (Rounds, 2015 :1376). Let us discuss the appropriate Articles from *Lex Salica*.

## Acfatmire and De Terra Commendata (Linguistic and Juridical Analyses)

### The Salians' *acfatmire* and the Ripuarians' *adfati*

The process denoted by the lexical unit *acfatmire* is presented in Article 46 of *Lex Salica*<sup>2)</sup>, whose translation was made by Rivers in 1986:

“Concerning the transfer of property [that is, adoption of an heir, *acfatmire*]

1. This is to be observed [by anyone who wishes to transfer his property] so that the *thunginus* or the *centenarius* should call the court, and [the prospective transferors] must have a shield in the same court, and afterwards three men [as witnesses] must be asked three questions by this same court. Then let him [who wishes to transfer his property] summon a man [as a trustee] who is not related to him, and let [the transferor] throw a rod into his lap. And to him into whose lap he threw the rod, let [the transferor] say the words concerning his property for how much of it he wishes to give to him, or even if he wishes to give all or half of his property.
2. Afterwards he into whose lap [the transferor] threw the rod must live in [the transferor's] house and must receive three or more guests, and must have within his own power as much of the property as [the transferor] gave him. And, afterwards, he to whom that [property] is entrusted must do everything with witnesses present.
3. And afterwards [the transferor] must transfer his property either before the king or lawfully in court to him who he bestowed it upon, and let [the trustee] take the rod, and let him throw it into the lap of [the transferor's appointed] heirs in the same court before twelve months have elapsed, neither less nor more, but only as much as was [originally] entrusted to him.
4. And if anyone wishes to say anything against this [transferal], three witnesses must say under oath that they were at the court that the *thunginus* or *centenarius* convened, and how they saw that man, who wished to give his property, throw a rod into the lap of him who he had already selected. And they must identify him by name who threw his rod into the lap [of the other]; and thus he into whose lap he throw it and he who he proclaimed as his heir should be publicly identified” (Rivers, 1986 : 92-93).

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2) “*Hoc convenit observare ut thunginus aut centenarius mallo indicant et scutum in illo mallo habere debent et tres homines tres causas demandare debent. Postea requirent hominem qui ei non perteneat et sic fistucam in laisum jactet. Et ipse in cui laisum fistucam jactavit, in casa ipsius manere debet. Et hospites tres vel amplius collegere debet et de facultatem quantum ei creditum est in potestatem suam habere debet. Et postea ipse cui isto creditum est, ista omnia cum testibus collectis agere debet. Postea aut ante rege aut in mallo illi cui fortuna sua depotavit reddere debet et accipiat fistucam in mallo ipso. Ante XII menses quos heredes appellavit in laisum jactet; nec minus nec ma jus nisi quantum ei creditum est.*

*Et si contra hoc aliquis aliquid dicere voluerit, debent tres testes jurati dicere quod ibi fuissent in mallo quem thunginus aut centenarius indixerit et quomodo vidissent hominem illum qui fortuna sua dare voluerit in laisum quem jam elegit fistucam jactare: debent denominare illo qui fortuna sua in laiso jactat et illo quem heredem appellit similiter nominent. Et alteri tres testes jurati dicere debent quod in casa illius qui fortuna sua donavit ille in cujus laisu fistuca jactata est ibidem mansisset et hospites tres vel amplius ibidem collegisset et in beodum pultis manducassent et testes collegissent et illi hospites ei de susceptione gratias egissent. Ista omnia illi alii testis jurato dicere debent et hoc quod in mallo ante regem vel legitimo mallo publico ille, qui accepit in laisum fortuna ipsa aut ante regem aut in mallo publico legitimo hoc est in mallobergo ante teoda aut thunginum fortunam illam, quos heredes appellavit publice coram populo fistucam in laiso jactasset; hoc est novem testes ista omnia debent adfirmare” (Lex Salica, 1897).*

In 1991 Drew presented another English version of Article 46:

“1. It should be done thus. The thunginus or hundredman should convene a court. In the court he should have a shield, and there three men should state the case three times. And afterward let a man appear who is not related to him [who wishes to transfer his property], and he [the transferer] should throw a stick (festuca) thus into his lap. And he should say to the man into whose lap he threw the stick how much he wishes to give him [the selected donee] — if he wishes to give him all or half of his property.

2. And afterward the man in whose lap the transferer threw the stick ought to stay in that one's house and receive there three or more guests and have in his control as much of the property as was given to him. And he to whom it was given should do all these things in the presence of assembled witnesses.

3. Afterward within twelve months he [the transferer] should in the presence of the king hand over his property to him whom he designated or who received the stick in legitimate court — neither more nor less than the amount he gave to him he named as heir and into whose lap he threw the stick.

4. And if anyone wishes to contest this, the three witnesses should declare under oath that they were present in the court that the thunginus or hundredman convened and that they saw in what manner that man, who wished to give his property, threw the stick into the lap of him whom he had chosen. And they should name by name the man who threw his property into someone else's lap, and they should likewise name him in whose lap it was thrown and publicly called heir.

5. And three other witnesses should state under oath that he in whose lap the stick was thrown remained there in the house of that one who had given him his property and that he assembled there three or more guests and fed them and these three or more guests offered thanks to him in accepting and ate porridge (pultes) at his table (beode) and the three were together as witnesses.

6. And three other witnesses should declare on oath all these things that it was in court in the presence of the king or in a legitimate public court that he who received the property in his lap — either in the presence of the king or in legitimate public court (called anthæoda or tkungino in the Malberg gloss) — he [who was giving the property] threw the stick into the lap of that one publicly in the presence of all and thus [threw] his property into the lap of the man whom he called heir. The nine witnesses should affirm all these things in their testimony” (Drew, 1991 : 110-111).

The study of Article 46 reveals that *acfatmire* can be treated as a three-party relationship, which consists of a transferor, a transferee and an heir. The process of transfer seems comparable with the process of entrustment, while a transferee is comparable with a trustee. This fact is clearly depicted in Rivers' translation that presents the lexical units *trustee* and *to entrust*. Drew denotes a transferee with the lexical unit *donee*, which can be treated as a trustee, because the terms *donor* and *trustor* are synonymous in the context of entrusting relationships. Moreover, the ritual very similar to *acfatmire* “was used down to modern times in England for the transfer of copyhold, a staff being handed to the steward of the manor as a first step conveying copyhold land to someone else; the surrender to the steward is expressed to be to the use of the purchaser or donee” (Wynen, 1949 : 163).

It is important that in contrast to *Lex Salica*, *Lex Ripuaria* denotes the process of adoption by the lexical unit *adfatmire* and presents it in the following way:

## Acfatmire and De Terra Commendata (Linguistic and Juridical Analyses)

“If anyone has no children, neither sons nor daughters, let him have the right according to Ripuarian law in the presence of the king to adopt an heir of all his property: if he is a husband, his wife, or if she is a wife, her husband, or whoever, either related or not related. Or let him transfer property [*adfatimire*] through charters or let him hand over [his property when] witnesses are summoned. If a man and his wife transfer property [*adfatimus*], let the inheritance revert to the lawful heir who survives them after the death of both, except in so far as [the deceased husband] may have spent on alms or on his own needs” (Rivers, 1986 : 193).

Accordingly, when direct heirs did not exist, *Lex Ripuaria* allowed men and women to bequeath assets to their spouses through the process of adoption. However, the latter is not comparable with entrustment. Moreover, there are no trust-related terms in the above passage.

### Towards the Question of *De Terra Commendata*

While dealing with *Lex Salica*, we paid attention to Article 65c, which is entitled *De terra co(n)demnata*:

“LXVc.

#### De terra co (n) demnata

Si quibz alteri auift)am terram suam co(n)demnauerit et ei noluerit reddere, si eum admalluerit et conuinxerit, (pc denarios qui faciunt} solidos XV culpabilis iudicetur” (*Lex Salica*, 1953 : 235)

This article was translated by Rivers in the following way:

65c

#### “Concerning entrusted land

If anyone entrusts his ancestral land to another and he is unwilling to pay him [the tribute owed as payment for safekeeping his land], let him be held liable, if [the trustee] summons him to court and convicts him, for 600 denarii, which make fifteen solidi” (Rivers, 1986 p. 110).

It seems important that Rivers’ translation is accompanied by the following explanation: “The text gives *condemnare* (to condemn), but *commendare* (to entrust) should be substituted” (Rivers, 1986 : 159). This explanation motivates us to focus on Article 65c, which is differently numbered (and even entitled) in several manuscripts of *Lex Salica*. Here are some examples:

“LXXI

#### De terra condemnata

Si quis a terra condemnata fuerit et ei fuerit adprobatum, MMD denariis qui faciunt solidos Lxn semis' culpabilis iudicetur” (*Lex Salica*, 1953 : 235)

“LXLIX

#### De terra condempnata

Si quis terram alienam condempnauerit et ei fuerit adprobatum, <MMD dinarius qui faciunt> solidos LXII semis culpabilis iudicetur” (*Lex Salica*, 1953 : 238).

“LXXI

#### De terra condemnata

Cl quis terram alienam condempnauerit & ei o fuerit adprobatum, bis mille quingentis denariis , qui faciunt solidos sexaginta duos cum dimidio, culpabilis iudicetur” (Schilteri, 1728 : 93).

## Irina Gvelesiani

### “LXXII

#### De terra commendata

I. Si quis alteri avicám terram fuam commendauerit, & ei noluerit reddere, fi eum admallauerit & conuinxerit, DC.denar. qui faciunt fol. x v . culpabilis iudicetur” (Wendelino, 1649 : 46.)

### “De terra condempnata

(3 tit. 98 ; H tit. 72; Ef tii. 71.)

Si\* quis terram alienam condempnaverit et ei fuerit adprobatum solidos LXII et semissem culpabilis iudicetur.

\* si quis alteri avicaui terram suam commendav. et ei noluerit reddere si eum admallauerit et convinx. DC den. q. f. sol. XV culp. judic. H.” (Lex Salica, 1897 : 80)

### “LXXI

#### De terra condemnata

Si quis terra condemnata fuerit et ei fuerat adprobatum” (Coumert, 2023 : 320).

### “71

#### De terra condempnata

Si quis terram alienam condempnaverit et ei fuerit adprobatum, 2500 denarios qui faciunt solidos 62% culpabilis iudicetur (Lex Salica, 1850 : 80)

#### De terra commendata

Si quis alteri avicam terram suam commendaverit et ei noluerit reddere, si eum amallaverit et convinxerit, 600 din arios qui faciunt solidos 15 culpabilis iudicetur” (Lex Salica, 1850 : 80)

The study of the above passages reveals the existence of four different spellings of the word-combination *De terra co(n)demnata*, namely: ***De terra commendata***, ***De terra condempnata***, ***De terra condemnata***, ***De terra condemnata***. This fact may be stipulated by the usage of four verb-forms: ***commendare***, ***condempnare***, ***condannare***, ***condemnare***. However, the study of the data of the dictionaries (Latin-English Dictionary, Online Latin-English Dictionary, LatDict) prove only the existence of two Latin verbs - ***condemnare*** and ***commendare***.

The word ***commendare*** is polysemous and has the following meanings:

“1. commit

2. entrust, give in trust

3. point out, designate

4. recommend, commend to

Source: “Oxford Latin Dictionary”, 1982” (<https://www.latin-dictionary.net/search/latin/commendare> )

The lexical unit ***condemnare*** is polysemous and means:

“1. (pass) sentence

2. blame, censure, impugn

3. condemn, doom, convict

4. find guilty

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Source: “Oxford Latin Dictionary”, 1982” (<https://www.latin-dictionary.net/search/latin/commendare> )

It is noteworthy that none of the meanings of the word *condemnare* presented in the above word-entry suits the context of Article 65c. Accordingly, River’s opinion regarding substituting *condemnare* with *commendare* seems quite acceptable. Moreover, one of the above passages, namely, Article LXXI is entitled *De terra condemnata*. However, the first sentence of the article consists of the word-combination *quis terra condemnata*. The study of other passages reveals that the first sentence of every article repeats the verb used in the title. This fact enables us to suppose that the word *condamnata* may be treated as a mistake of the scribe, who wrote *condamnata* instead of *condemnata*.

Finally, in case of the title *De terra condempnata*, the word *condempnata* may be treated as a variant form of the lexical unit *condemnata*. If we consider that *Lex Salica* is preserved in about eighty manuscripts created between the eighth and sixteenth centuries, than we may assume that the spellings of some words could change throughout the centuries and the manuscripts could depict those changes. Moreover, attention should be paid to the fact that the scribes, who made copies of *Lex Salica*, did not understand its content. Additionally, they might make mistakes while copying.

### The Major Conclusions

Therefore, the present paper made an attempt to study the origin of the *trust* on the basis of the analysis of the Ripuarians’ *adfatmire* as well as the Salian Franks’ *affatomie* and *De terra co(n)demnata*. Special attention was paid to their juridical and linguistic peculiarities, as well as the verbal realization of some concepts presented in the Salians’ legal codes. The presented comparative analyses depicted the obvious similarity between the mechanisms of the Salian Franks’ *acfatmire* and English *use/trust*. Moreover, the parallel drawn between the rules of the entrustment of one’s ancestral land (Article 65c of *Lex Salica*) and English *trust* revealed the same attitude towards the transfer of one’s ownership.

Additionally, the linguistic analysis of the articles related to the *affatomie* and *De terra co(n)demnata* and their English translations depicted the existence of the trust-related words. The study of the existing data and appropriate word-entries of the dictionaries revealed that the word *commendata* was a verbal realization of the concept of *entrustment*. Moreover, the lexical unit *condempnare* presented in some manuscripts was treated as the variant form of *condemnare*, while *condamnare* was considered as a mistake made by scribes. The existence of the variant forms may be explained by various dating of the manuscripts of *Lex Salica*, which were obviously created in different centuries.

Accordingly, the carried out research enables us to state that the common law *trust* may have the Germanic roots and the elements of *Lex Salica* could be gradually imported in Britain by the Normans after the Battle of Hastings.

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## ORIGINAL PAPER

# When constitutional custom is stronger than the constitutional text

Muhammad Khairy Qsair<sup>1)</sup>, Sarab Thamer Ahmed<sup>2)</sup>

### Abstract:

**The aims:** This paper aims to prove that constitutional custom in practice has become stronger than the constitutional rule, and it also aims to shed light on a very important point, which is that those in power or ruling parties in countries sometimes impose a constitutional custom despite the existence of a constitutional text.

**Purpose of the paper:** The paper attempts to draw attention to the fact that the process of imposing constitutional custom practically in the face of the constitutional text will gradually eliminate the idea of the supremacy of the constitution and the superiority of the constitutional text. This paper also attempts to show the extent of the possibility of restoring authority and powers to the constitutional text and thus returning the matter to its correct place and true constitutional status in the face of constitutional custom.

**Methodology:** The researcher relied on the method of analyzing the constitutional text and the extent of its binding, as well as the method of comparing cases witnessed by many countries' practices.

**Main results and conclusions:** The paper concluded an important basic result, which is that constitutional custom has become stronger than the constitutional rule due to the practices of the ruling authorities. The other result is that custom is usually stronger in countries whose constitution is brief and lacks some details in the provisions.

**Keywords:** *constitutional custom, constitutional rule, equal opportunities.*

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## **When constitutional custom is stronger than the constitutional text**

### **Introduction**

If the constitutional custom consists of the frequency of action by public authorities on a specific custom or on a subject of a constitutional nature, then it takes on a character close to being obligatory among those who work with it, but it does not rise, at least from the theoretical aspect, to the level of a constitutional text that imposes... Its influence, presence, and obligation over all public authorities, and even imposes its supremacy over legislation, regulations, and instructions, both those that preceded it and those that follow it in time, such that there is no survival of a law that includes what contradicts the constitutional text, and there is no life for legislation whose texts contain anything that conflicts with the constitutional text.

However, the practical reality is different. The constitutional custom began to gain more binding force on the one hand. On the other hand, it began to displace the constitutional text from its competition, which made the constitutional custom take precedence in practical status over the constitutional text. In Iraq - the subject of the study - it became a custom. Constitutionally, the President of the Republic represents a specific party, and the matter applies to the selection of the Prime Minister and the Speaker of the House of Representatives, although the constitutional text in Article 68 states that the candidate for the Presidency of the Republic is required to be an Iraqi by birth and of Iraqi parents. However, with this constitutional text and its implementation, Any Iraqi individual cannot obtain this position unless he is from the party appointed according to the constitutional custom and the matter also requires running for the positions of Prime Minister and Speaker of Parliament.

This paper attempts to show the extent of the possibility of restoring power and authority to the constitutional text, thus returning the matter to its proper place and its true constitutional place in the face of constitutional custom.

### **I. the definition of the constitutional custom**

It is not surprising if we say that constitutional custom appeared before constitutional rule. The customary rule is the first legal rule that came into existence because it is linked to the need of individuals to organize their social relations and it is a matter linked to the lives of individuals in every society. Rather, it came into existence with the existence of individuals on earth.

Constitutional custom can be defined as a term to express the situations that the public authorities in the state have become accustomed to following in carrying out their activities in one aspect of their work related to a constitutional issue over a period of time, and with the belief of the individuals in that authority that this repetition has become binding on them and has the force of a constitutional rule ( Ehsan Hameed & Qatran Zqeer 2011: 60).

In other words, constitutional custom is a set of rules and practices followed by public authorities, which derive their legitimacy from continuous and repeated use, despite the absence of written legal texts governing them. Constitutional custom is considered one of the sources of constitutional law, and expresses the political and legal traditions that develop within society (Naaman Ahmed Al-Khatib 2009:465).

The meaning of constitutional custom must be clarified in terms of concept and function. In terms of concept: Constitutional custom is an unwritten rule that is formed as a result of consensus of opinions and practices over a long period, and is accepted as part of the legal system.

This definition can be well explained by the concept of material constitution , elaborated by the Italian constitutional scholar Costantino Mortati. It refers to what the dominant political force decides. Mortati argues, in ways that were interpreted to be compatible with the Italian fascist regime in the 1920s and 1930s, that political choices coming from the dominant political party are the real content –the political content– of the constitution. The material constitution is the fundamental constitution, the concrete constitution opposite to the formal one( Eleonora Bottini 2020).

In terms of function: Constitutional custom works to fill legal gaps that may arise in constitutional texts, and enhances the stability of the political system. Examples of constitutional custom include the fact that in many systems, the government is formed after elections according to certain traditions, such as negotiations between parties. Although the negotiation process is not stipulated in the constitution, most constitutions stipulate a mechanism for forming the ministry, for example, through the largest parliamentary bloc (Article of the Iraqi Constitution of 2005).

## **II. The difference between constitutional custom and customary constitution**

The customary constitution is a set of rules arising from customs, customs and precedents that have not yet been written down in a written document. It is specific to countries that do not have written constitutions, such as England. As for constitutional custom, it is also A set of rules arising from customs, traditions and precedents, but within the framework of a written constitution and These rules have a role that explains, complements, or modifies the provisions of the constitution. They are found in countries with written constitutions next to the constitutional documents(Al-Zubair Hamza Al-Zubair 2023 :32) .

## **III. Elements of constitutional custom**

There are two basic elements for us to be faced with a constitutional custom, the material element and the moral element , First, the material element: Some people believe that the material element is the actions and behaviors issued by one of the governmental bodies, such as the king when his work is legislative or executive authority, or those actions issued by the prime minister regarding political matters exclusively ( Numan Ahmed Al-Khatib 2009 :466). We agree with this opinion if it is only intended for matters related to political affairs and not those related to other executive powers, because constitutional custom must result from the texts of the constitution only. In other words, constitutional custom, even if the work or behavior is in a legislative or executive matter, cannot be described as constitutional custom unless it is based on a clear constitutional matter that is without doubt.

It is clear that the material element requires the following elements to be fulfilled.

1-Repetition of the act or action, whether the repetition is positive or negative, because the act being done once does not mean that we are facing a constitutional custom (Othman 1952 :98).

2-The second condition is that it be issued by a public authority, whether legislative, executive or judicial. What is important here is that it be related exclusively to constitutional issues. Regarding the research idea, we say here that this element has been available since 2003 through the Provisional Coalition Authority, which was originally formed based on the components of Iraqi society.( The Coalition Provisional Authority in Iraq was the first authority established to administer Iraq after April 2003. The CPA based its governance of Iraq on UN Security Council Resolution 1483 of 2003).

The second element / the moral element;

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In order to be faced with a constitutional customary rule, the moral element must be present, which means the binding characteristic, and the binding here is the belief among the governmental, legislative and concerned parties that this customary rule has become a binding rule that cannot be violated. This element is an internal feeling among the parties of the necessity of commitment, and some jurists call it the psychological element (Perlot, M 1972: 203).

It is always required that the actions or behavior of the public authorities must not be in violation of an existing and explicit constitutional text based on the principle of good faith (Duverger, M, 1980: 204).

Referring back to the idea of the research, we find that this element is present in the authorities' dealings with the distribution of senior positions in the state, we mean here the presidency of the House of Representatives, the presidency of the republic and the presidency of the Council of Ministers. In Iraq, for example, there is a constitutional custom among most political forces that the position of The President of the Republic is for a specific political party that represents one of the nationalities that make up Iraqi society, and the same applies to other presidencies.

### **IV. Types of constitutional custom**

The type of constitutional custom is determined according to the task it performs towards the constitution, or a text of the written constitutional document. It may remove ambiguity surrounding the constitutional text, or it may complete a deficiency in the constitution by bringing up issues that the constitution did not address in the organization, or it may amend an existing constitutional text, whether the amendment is by deletion or addition. Accordingly, the constitutional custom varies into an interpretative custom, complementary custom, and a modified custom (Ahmed Jad Raslan, 2013: 89).

#### **1- The interpretive custom**

It is a custom whose effect is limited to interpreting a written text in the constitution, by clarifying its meaning, as it does not create anything new, but rather stops at the level of interpretation and clarification. Jurisprudence holds that this type of custom has the force of the constitutional legislation that interpreted it (Ibrahim Darwish, 2007:92). Among the examples that jurisprudence mentions of interpretive custom are the customs that were formed in the French Third Republic Constitution, which was brief and general, as one of its articles stipulated that the President of the Republic guarantees the implementation of laws), but the text did not specify the means by which the President of the Republic can guarantee the implementation of laws, and for this reason an interpretive custom arose for this text that included granting the President of the Republic the right to issue executive decrees despite the absence of an explicit text in the constitution granting him this right; and based on custom as well, the principle of universal suffrage introduced by the Constitution of the Third Republic was interpreted, without specifying whether this universal suffrage was direct or indirect, as custom determined it and made it direct and secret; It is noteworthy that the interpretation of the ambiguous constitutional text raises an important issue, which is knowing the body qualified to carry out the task of interpretation (Hamed Jawad Muhammad, 2022: 13) . The Federal Supreme Court in Iraq used this type of custom when a dispute arose over the meaning of the term “the largest parliamentary bloc” in the Iraqi Council of Representatives, as the constitution did not clarify the meaning of this term contained in Article 76 of the Iraqi constitution. The court decided that the meaning of the term is the bloc that is formed after the elections within parliament. Noting that the Federal Supreme Court in Iraq issued more than one decision on the same subject, including Decision No. 45 of 2014, and the content of its decisions

(and their content is that the expression (the largest parliamentary bloc) mentioned in Article (76) of the Constitution means either the bloc that was formed after the elections through a single electoral list, or the bloc that was formed after the elections from two or more electoral lists and entered the House of Representatives and its seats became, after entering the Council and its members taking the constitutional oath in the first session, the largest in number of the rest of the blocs, so the President of the Republic is responsible for assigning its candidate to form the Council of Ministers in accordance with the provisions of Article (76) of the Constitution.

It can be said here that constitutional texts can usually be described as brief and general, which in certain cases raises difficulties in interpreting some articles of the constitution, which are those that are shrouded in ambiguity. The interpreted constitutional custom is the one whose effect is limited to merely interpreting and clarifying an ambiguous constitutional text. The following elements are inferred from this definition: 1- The interpreted constitutional custom is always based on a constitutional text. 2- The interpretation must not contradict the constitutional text positively or negatively. 3- The interpretation may not amend the interpreted text, but its effect is limited to removing ambiguity. 4- The interpreted constitutional custom does not introduce any new legal rule. 5- The interpreted constitutional custom has the same legal value as the constitution. 6- The interpretation becomes part of the constitution and acquires a binding character( Suleiman Batarseh Constitutional Custom between Theory and Practice, Jerash for research and studies journal, volume 3 , issue 2,2002, p21).

### **2- Complementary custom**

It is a custom that is based on organizing some topics that the constitution did not address, meaning that it completes the deficiency that may exist in the constitutional document. Thus, the supplementary custom differs from the interpretative custom in that it is not based on a constitutional text included in the constitutional document, but rather is created to complete a deficiency in its texts, and it also creates new legal rules to organize what these texts omitted. Some believe that the supplementary custom completes a deficiency in a rigid constitution ( Mohammad abo Zaid Mohammad,1870:55). In other words, the “complementary constitutional custom” differs from the “explanatory constitutional custom”: if the explanatory custom is limited to interpreting what is ambiguous in the texts and provisions of the constitution, that is, it is based on existing constitutional texts that it interprets and clarifies what is ambiguous and vague in them, then the supplementary custom, on the contrary, creates a new rule that completes the deficiency that has befallen the constitution. It addresses a specific topic related to the system of government in the state that the constitutional legislator neglected to organize, and therefore it is not based on an existing text or one that is present in the core of the constitutional document. In this regard, we can refer to Article 124 of the Iraqi Basic Law issued in 1925, which states that: {Constitutional traditions that are not provided for in this law, and there is no text that prohibits their adoption, and were followed in constitutional states, may be adopted and applied as a constitutional rule by a decision of the national assembly in a joint session}. This text, it seems, acknowledges the role of custom in complementing constitutional texts ( Hassan bahrey,2018:79 ).

### **3- The amended constitutional custom**

The amended constitutional custom is the custom that amends a provision of the written constitution. The danger of the amended custom is that it contradicts a text of the constitution, because the amendment necessarily includes the meaning of contradicting the text, and this is in contrast to the custom that interprets the text of the constitution or

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that completes its silence. Hence we understand the reason for the controversy that the amended custom can raise and that it actually raised among jurists. It has become customary in constitutional jurisprudence to distinguish between two types of amended constitutional custom: the custom amended by addition, and the custom amended by deletion (Mohsen Khalil, 1969:56).

### **1-The custom amended by addition:**

By virtue of its name, it adds a new rule or a new rule to the existing constitutional texts. In this respect, it is similar to the supplementary custom. However, the custom amended by addition differs from the supplementary custom in that the supplementary custom assumes that the constitution is silent about regulating a specific topic, so the supplementary custom comes to complete and fill this deficiency and establish the organization that the constitution was silent about. While the custom amended by addition assumes that the constitution has included a specific organization for a specific topic, and the amended custom comes to add to this constitutional organization provisions that would amend this organization. This addition that this type of custom brings is often in the form of granting the governing bodies a new jurisdiction that was not decided for them according to the texts of the constitution, and such that the interpretation of these texts does not allow for the creation of this new jurisdiction. Here the importance of the custom amended by addition appears because it establishes this new jurisdiction in a way that represents an amendment in addition to the existing constitution. One of the most prominent examples of the additionally modified custom in France under the Third and Fourth Republics was the custom of the French Parliament authorizing the government to issue decisions or decrees that had the force of law. This was an additionally modified custom, because the texts of the Constitution of 1875 (Third Republic) and the Constitution of 1946 (Fourth Republic) gave Parliament exclusive jurisdiction in legislation and did not allow any legislative authorization for the government.

### **2-The custom modified by deletion:**

It means neglecting a text of the constitution in application for a sufficient period, in a way that allows it to be said that this text has fallen and been deleted due to disuse. The custom here is represented by the continued neglect of the application of the text and its non-use, which leads to the deletion of this text from the constitution as a result of the custom. One of the examples that jurisprudence gives of the custom modified by deletion is the failure of the President of the Republic in France to use his constitutional right to dissolve the House of Representatives, despite the establishment of this right in one of the texts of the 1875 Constitution of the Third Republic (Ramzi Al-Shaer, 1981:85).

Returning to the subject of our research, we find that the amended constitution almost applies to the idea through the fact that what is happening in terms of distributing senior positions on the basis of the components of society and not on the basis of the principle of equal opportunities contained in the constitution means that this amended custom has violated the text, because even if the door to nomination is open to everyone, there is no opportunity to occupy the position as long as what is customary in dealing is the division on the basis of components.

## **V. Applications of the superiority of constitutional custom over constitutional text**

One of the important applications that we have observed in practical reality is the process of selecting the three presidencies in Iraq. The selection of the President of the Republic, the Prime Minister and the Speaker of Parliament is based on population distribution. In other words, since 2005, the President of the Republic is selected from the

Kurdish nationality, and the Prime Minister is from a specific sect of the Arab nationality, as is the Speaker of Parliament. This division has made dealing with it a clear form in which no one can compete for the above positions, and even the nomination for those positions is competition between one sect exclusively. This means that the position of President of the Republic is for the Kurdish nationality, so no one from the other sect can run, and even if he runs, he will not get more than his vote only, so the result is inevitably decided.

### **Conclusion**

We conclude from the above research that constitutional custom has become in practical reality and application in a stronger position than the constitutional text, although the latter has supremacy and superiority in all constitutional law literature. The strength of constitutional custom at the expense of the constitutional text comes from two points: The first is that the constitution is sometimes not comprehensive in its formulation or the intended provision is not detailed in a way that prevents circumventing it or interpreting it according to the desires of those in power. The second point is that politicians attempt to achieve a balance between the components of society, but at the expense of the texts of the constitution. We believe that the optimal solution is to respect the texts of the constitution and the principle of equal opportunities for all.

### **Authors' Contributions:**

The authors contributed equally to this work.

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## ORIGINAL PAPER

# A Phenomenology of Showcase Performance in Iranian Public Organizations

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### Abstract:

Nowadays, more than presenting real performance, managers in public organizations are minding pretentious and demonstrative behaviors the continuity and prevalence of which lead to long-term irreparable damages. In management research and literature, such an issue is called “showcase performance” which is scientifically a new phenomenon about which there is a lack of understanding regarding its concept and dimensions. Therefore, the present study aims to conduct a phenomenology study about showcase performance in Iranian public organizations and to identify its dimensions. In terms of the purpose, the study is of applied-developmental type, and is mixed exploratory in design. In the qualitative phase, semi-structured interviews with elites were used, and theme analysis technique was applied, and confirmatory factor analysis was used in quantitative phase. In qualitative phase, 27 elite participants were selected through purposive sampling technique, and then interviewed until the theoretical saturation. Based on the results, for showcase performance, three dimensions of cognitive, communicative, and behavioral were established, and seven components were identified as well. In quantitative phase, a questionnaire was distributed among 108 participants including managers and elites in Iranian Ministry of Energy in order to test the research model. The data were then analyzed using confirmatory factor analysis and Smart PLS. The results confirmed the identified dimensions and variables. Ultimately, the results of the study indicated that showcase performance in public organizations is a multifaceted and complicated phenomenon, and

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in order to manage it, cognitive, behavioral, and communicative aspects must be taken into account simultaneously.

**Keywords:** *showcase performance, phenomenology, public organizations, theme analysis.*

### Introduction

Nowadays, performance of organizations, as a critical index in their survival, has been under discussions and investigations (Mohammadi&Sharifzadeh, 2017). Changes in work environment of organizations have a profound effect on the organization and its performance, and the organization ought to adapt and develop its mechanisms to survive (Caniels&Hatak, 2022). In Iranian public organizations, severe inefficiency is noticed in the field of organizational performance management policies (Mansoori, 2020), and despite the efforts that have been made, there hasn't been significant improvement in performance, responsiveness, transparency, and quality of services favorably (Aghapirooz, 2019). Moreover, a significant part of policies in public organizations aims at maximizing superficial aspects of the performance which may not help organizations reach sustainability in performance. In public sections, a large range of such policies is seen which is mainly dealing with execution of commands and exoneration of responsibility, and is less concentrated on the real performance aiming at satisfaction of stakeholders (Ghaderifar et al., 2021).

In the past few decades, the concept of performance has been put at the top of the public administration agenda, and has turned into a key goal. The most frequent and important changes in the last years have been concentrated on the concept of organizational performance and efficiency, where improvement of public section performance has been stated as the main goal (Rahnamud et al., 2016). On the other hand, high organizational performance is among the most remarkable components for managers and is defined as the ultimate goal of the organization (Garengo&Sardi, 2021). Unfortunately, hypocritical behaviors have expanded in organizational environments (Ağalday, 2022). In some public organizations, deviational demonstrative and showcase behaviors are increasing due to different reasons (Ashgarf& Amiri, 2018). Furthermore, lack of reliable and sufficient information, which results in digression in performance evaluation process, is one of the most distorting factors in performance evaluation and management in public organizations (Seidi&Sohrabi, 2015). At the present time, performance weakness of managers in public organizations is tangible, and has resulted in myriad of problems insofar as several managers are annually dismissed or castigated through hierarchies or customers (Khodavandpoor et al., 2020). Disqualification, incompetence, and immoral behaviors have spread among managers (Jafari et al., 2022).

One of the most crucial managerial damages is the emergent showcase management style. Showcase managers are those mainly following demonstrative behaviors and accordingly casting disruptive, negative, long-term effects over the people, organization, and society. The reason for such misbehaviors is the social and economic costs imposed on the organization (Salahipour&Ziaodini, 2022). Demonstration of showcase performance is introduced to be equal with deviated political behaviors such as hypocrisy, discord, pretending, flattery, exaggerating behaviors, and subservience (Ebrahimpour Ahandani et al, 2019). Discord of a manager mainly resembles the disagreement in his words and deeds (Ilsev& Aydin, 2021). Consequences of such deviant behaviors include organizational science, replication of hypocritical behaviors, increase in tendency to resignation, decrease in intrinsic motivation, lack of productivity, decline

of job satisfaction, cognitive heterogeneity, and increase in mental pressure for honest people (Hadavinezhad et al., 2013). However, if, in presentation of performance, the statistics are pretentious and demonstrative, negative effects will undoubtedly cast upon the aforementioned items, and inattention to presentation of performance results in demotivation (Ghorbani, 2018).

Moreover, with respect to the realization of defined goals in higher documents such as “the document of the Islamic-Iranian Model of Progress”, “principles of resistant economy”, “transformation of administrative system”, etc., the need for achieving real performance by governmental organizations is felt, and showcase management and other pretentious actions are opposed to realization of such goals. It is needed to maintain appropriate understanding of different aspects of showcase performance in order to overcome it and reduce the use of it among public managers. Furthermore, an investigation on the legal foundations and consideration of legal assignments for governmental bodies in order to establishment of performance management system intensifies the importance of the problem. Accordingly, chapter Eleven of Civil Service Management Act (articles 81, 82, and 83) and executive by-laws and instructions have all left very significant and heavy burden for executive bodies.

Showcase performance is one of the representations of political behaviors and deviant actions along with common discord among Iranian public organization managers. Managers of public organizations unfortunately think of showcase performance and superficial actions rather than real performance. Hence, developing a local and functional model for showcase performance is needed in order to identify and interpret different facets of the phenomenon. Therefore, doing the present study seems essential for public organizations in order to move toward real performance with the aim of realization of higher documents goals. On the other hand, realization of requirements such as meritocracy, development of human resources, talent management, succession, and the like in public organizations is impossible without considering real performance of managers and differentiating real performance from the superficial one. Simultaneously, results of research studies show that showcase performance is repeatedly seen in the performance of managers in Iranian Power Ministry, and real performance contradicts the statements and reports from managers. Hence, in order to make a distinction between talented and merited managers with real performance and hypocritical ones with flashy performance, and to move toward development and training of skillful managers and recruitment of them in important positions in public organizations, it is necessary to identify the concept of showcase performance and its different aspects. The results of the present study which is conducted to present an applied pattern for identification and prediction of showcase performance in employees can be utilized by public organizations which are after evaluation of performance specially and periodically. The main question of the study deals with the aspects and components of showcase performance in public organizations.

### **The Concept of Showcase Performance**

The phrase showcase performance was first used in Ghorbani (2018) as an academic concept. In the study, showcase performance was introduced as a deviant and unfavorable behavior. Conceptually, showcase performance maintains semantic affinity with academic concepts such as “organizational policy”, “organizational discord”, “hypocrisy and two-facedness”, “rhetoric”, etc. Moreover, a number of supporting theories for showcase performance include Peter Principle, Machiavellianism, Natural

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Selection, Thirst for Dignity, McClelland's Achievement Motivation Theory, Toxic Leadership Theory, and Broken Windows Theory (Ghorbani, 2018). However, none of the theories completely explain the concept of showcase performance; the phenomenon is multifaceted and is beyond such theories.

With the arrival of new sciences, management styles have also undergone changes, among which is the arrival of showcase management which revolves around demonstration of performance rather than real performance (Salahipour & Ziaodini, 2022). Simply put, a common political behavior having become attractive for researchers is utilization of “showcase performance” by managers and employees in organizations. Showcase performance in organizations entails a kind of deviant behaviors in which managers and employees make a negative and disruptive impression on people, organization, and society through their demonstrative and superficial behaviors (Ghorbani, 2018); however, there is significant difference between showcase performance and hypocrisy, organizational discord, flattery, and exaggerating actions in positive and negative aspects of such behaviors. Hypocrisy and discord are considered as a negative deviant behavior whose consequences cannot bring about positive and favorable effects. Accordingly, and based on results from Ghorbani (2018) and Fouladi (2020), the level of showcase performance can be high or low. If showcase performance is considered as in two extremes of an axis, it can be maintained that different effects are posed upon the organization (Ghorbani, 2018).

Showcase performance style refers to a style of performance in which managers and employees in an organization pose disruptive, negative, and long-term effects on people, organization, and society through their demonstrative, superficial, and hypocritical behaviors (Fouladi et al., 2020). Showcase performance from subordinate employees and showcase management from the managers are seen. Such a style in performance or management revolves around demonstrating the performance rather than real performance and productivity. In other words, demonstrative indices and noticeable performance are extremely attended by the manager, and real performance indices are neglected (Ghorbani, 2018). Showcase managers solely rely on ornamentation of their performance window while employees and customers do not see any trace of improvement inside the organization, and due to the abandonment of the system, problems such as statistics manipulation, flattery, flatter-arousing behaviors, executive corruption, and nepotism rise (Fouladi et al., 2020).

It is believed by many that showcase performance arises negative effects on the organization; however, it can be proven wrong. Showcase performance may be constructive or disruptive in an organization. The level of showcase performance can be high or low. The favorable level is when showcase performance is utilized to present performance and activities of the organization in order to achieve the pre-determined goals (Ghorbani, 2018). Showcase performance and its benefits are provided in Table 1.

Level of showcase performance	Benefit for the person	Attributes of the Person	Type of showcase performance
Low	Low	It is considered that the person does not have the skill, commitment, and motivation, and does not show favorable performance at work.	Disruptive

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Favorable	High	The person is satisfied with himself, the organization, and circumstances, and can prove his skills and capabilities to other, and is hopeful for the future.	Constructive and optimal
High	Low	The person concentrates on demonstration of the performance rather than real one, is considered as a person who follows his own personal benefits, and as a flatterer.	Disruptive

Table 1: Types of showcase performance and its characteristics (Ghorbani, 2018)

The favorable level of showcase performance can hinder recession, indolence, and stagnancy in organization, and bring about positive favorable effects in the organization. For instance, and as an example of such behaviors, multiple agreements, meeting with famous figures, embellished interviews with media, photos with famous people and advanced venues, making managerial long-term promises, pleasing behaviors of employees and customers without organizational support, etc. can be considered. Negative consequences of showcase management can be nepotism, flattery-arising behaviors, statistics manipulation, superficiality, administrative and moral corruption, and wasting financial and human resources (Salahipour&Ziaodini, 2022).

**Literature Review**

Showcase performance and its related concepts are investigated in research studies. Salahipour&Ziaodini (2022) identified and ranked factors affecting the arrival of showcase management in Sarcheshmeh Copper Complex. Based on the results, the factors affecting the advent of showcase management include lack of strategic intelligence, lack of meritocratic system, and lack of effective performance evaluation system. Seifi et al. (2022) developed a rhetoric pattern for managers in public organizations. The results showed that managers use verbal tricks to justify themselves, cover up their imprudence, and deceive others. Moreover, public systems ought to prioritize meritocracy and avoid assigning inapt and inexperienced managers to overcome rhetorical actions. Results of the study conducted by Fouladi et al. (2020) suggested that the consequences of utilizing showcase performance style include decline in productivity and efficiency, increment of administrative corruption, decline of creativity and innovation, decrease in job satisfaction, decrease in job motivation, and decline in spirit of employees. Findings in Yousefiet al. (2019) showed that components of individual factors (except for narcissism), job-related factors (except for job feedback), organizational factors (except for concentration and size of organization), and environmental factors can predict managers' political skills. Ghorbani (2018) presented a conceptual framework for processing the theory of showcase management. The results indicated that the four factors affecting showcase management include authoritarianism, need for publicity, personality, and emotional possession. Findings in Zarghamifard&Danayifard (2016) pointed out that two themes including behavioral honesty (truthfulness, promise keeping, , and adaptation in speech and deed) and moral behavior (trying for gaining divine satisfaction, reliability, kindness, respecting others, justice, sense of commitment, and following rules and regulations) were considered as the main aspects of righteousness of managers.

Findings in Lu et al (2022) showed nine types of distinctive pretending on basis of social collaborative responsibility behaviors and collaborative hypocritical behaviors on basis of pre-event, in-event, and post-event. Shah &Surienty(2021) conducted a study in which it was shown that organizational policies are harmful to the organization since

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they pose obstacles for management rather than maintaining calmness for employees. Furthermore, having policies among managerial and non-managerial employees result in forming obstacles for an organization. Winkler et al. (2020) pointed out that for corporate social responsibility, rhetorical talks can grab attention of members of the organization. Nonetheless, insistence in the rhetoric forms and perpetuates tensions which bring up separation and disagreement. Wagner et al. (2020) identified three theoretical aspects for corporate discord perception including moral discord, behavioral discord, and discord documents. The perceptions result from two distinctive conceptual paths including deceptive methods of managers and incompatible behaviors, and lead cognitive, emotional, and behavioral reactions of stakeholders. Findings of Mishera et al. (2016) puts forward that consequences of workforce diversity (organizational level), conflict of relationship (work environment level), and need for power (individual level) have positive significant impacts on organizational policies.

All in all, despite the fact that “performance management”, “organizational discord”, “demonstration and discord of managers”, and “political and deviant behaviors of managers” have been studied in different research studies, the keyword “showcase performance” seems a brand new issue which seeks to introduce a common and complex concept along with integrating other related concepts and to reveal its unknown aspects. Hence, the present study can fill the present research gap and increase the knowledge about “showcase performance.” Showcase performance is a new subject to have only been studied in three research studies done by Salahipour & Ziaodini (2022), Ghorbani (2018), and Fouladi et al. (2019) where a conceptual framework and its consequences have been investigated shortly and on an item-based basis, and the three studies have been conducted following grounded theory which is utilized for less known subjects, and suggest lack of sufficient knowledge about the cause-and-effect factors and different aspects of the subject of showcase performance. After searching for English articles with the title of “showcase performance” and “showcase management,” no results were found by the researchers. Therefore, it seems a research study entitled as phenomenology of showcase performance in organizations can be innovative since in the available studies for the field of showcase performance, no complete conceptualization for the aspects and components of showcase performance has been done, and no comprehensive understanding is at hand. In the present study, identification of aspects and components in public organizations was sought, because of which the study can be considered as innovative. In the study, semi-structured interviews with elites were used, and the collected data were interpreted using theme analysis technique.

### **Methodology**

The present study aimed at identifying and determining different aspects of the phenomenon of showcase performance in Iranian public organizations. The study is applied-developmental since it sought to increase knowledge and develop academic knowledge in the field of showcase performance in public organizations. Moreover, due to the fact that the results of the study will be used to improve the management conditions in public organizations, the study is applied in type. Furthermore, the study is mixed. In qualitative phase of the study, theme analysis was used, and in quantitative phase, confirmatory factor analysis was used. The approach of the study is exploratory since it sought to identify aspects of showcase performance about which limited knowledge and awareness is available, and the results of the study can increase the knowledge and enhance academic foundations in the field of showcase performance.

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In quantitative phase, and in order to develop research model, semi-structured interviews and theme analysis technique were used. For this purpose, ten academic elites and seventeen managers in public organizations who were selected through purposive sampling technique were interviewed. Accordingly, a protocol including interview information and developed questions was formed, and the interviews were then conducted. The interviews were continued until theoretical saturation was achieved. While holding Ph.D., academic elites were educated in different branches of management or other related fields, and were familiar with showcase performance. Executive elites held at least a Master's degree, with ten years of management experience in public organizations, and were familiar with academic discussions in management. After interviews and collecting the data, coding stages were fulfilled and components of research model were identified. After developing the model, validity of the study was assessed based on the criteria for investigating validity and reliability. The information for academic and executive elites are separately sorted in terms of position and education level in Table 2.

<b>Position</b>	<b>Education</b>
CEO assistant	Ph.D.
CEO assistant	Ph.D.
Deputy of HR & Research	M.A.
Organizing and Methods Improvement officer	Ph.D. Candidate
Strategic Management and Productivity Officer	M.A.
HR Planning & Education Officer	M.A.
Employees & Welfare Affairs Officer	M.A.
Mahdasht Water and Sewage Organization Manager	B.A.
IT Officer	M.A.
Organization, Education & HR Officer	Ph.D. Candidate
Budget & Economic Investigations Officer	B.A.
Consumption Management Officer	B.A.
Water Utilization Officer	M.A. Student
Sewage Utilization Officer	Ph.D.
Customer Services Officer	M.A.
Water Utilization & Development Deputy	Ph.D. Candidate
Karaj Water and Sewage Organization Manager	B.A.
Faculty Member in Management & Accounting Faculty, Islamic Azad University of Qods, Iran	Ph.D.
Faculty Member in Management & Accounting Faculty, Islamic Azad University of Karaj, Iran	Ph.D.
Faculty Member in Management & Accounting Faculty, Alame Tabatabai University, Iran	Ph.D.
Faculty Member in Management & Accounting Faculty, Tehran University, Iran	Ph.D.
Instructor in Management & Accounting Faculty, Islamic Azad University of Qods, Iran	Ph.D.
Instructor in Management & Accounting Faculty, Islamic Azad University of Karaj, Iran	Ph.D.
Faculty Member in Management & Economics, Islamic Azad University, Science and Research Branch, Tehran, Iran	Ph.D.



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Faculty Member in Management & Economics, Islamic Azad University, Science and Research Branch, Tehran, Iran	Ph.D.
Faculty Member in Management & Economics, Islamic Azad University, Science and Research Branch, Tehran, Iran	Ph.D.
Faculty Member in Management & Accounting, Islamic Azad University, Mashhad, Iran	Ph.D.

Table 2: University and executive elites' characteristics based on responsibility and education

In quantitative phase, confirmatory factor analysis and Smart PLS were used to verify the validity of the developed model. The statistical sample for the validation of the research model were managers and experts of Iranian Power Ministry. At this level, the size of the sample was 150 of senior and middle-level managers of Iranian water and sewage companies who were active in human resources deputy. The size was calculated using Cochran formula, and the sample was selected using simple random sampling. The size of the calculated sample was 108. Validity of the questionnaire was confirmed by three elites after modifications. Moreover, the validity of the questionnaire was calculated to be 0.829 through Cronbach's alpha, which was acceptable. The information of the sample is shown in Table 3.

<b>Gender</b>	
Male	81
Female	27
<b>Education Degree</b>	
B.A.	16
M.A.	65
Ph.D.	27
<b>Work Experience</b>	
10-20 years	39
20-30 years	59
More than 30 years	10
<b>Age</b>	
35-45	25
45-55	50
More than 55	33

Table 3: Characteristics of sample participants

### Findings

The present study was done in two stages of theme analysis and confirmatory factor analysis. In order to analyze the data collected from the interviews, theme analysis technique was used. The technique is for determining, analyzing, and representing the themes inside the data. After the interviews, and at the first stage, the content of the interviews was meticulously investigated, and the codes were extracted. In the study, the method in Braun & Clarke (2006) was used for data analysis through theme analysis technique. Based on Braun & Clarke (2006), the process of theme analysis starts when the analyzer considers the patterns of meanings and topics which are potentially attractive. The analysis includes a continuous back-and-forth movement, coded summaries, and analysis of the data that are formed.

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In order to conduct the process of theme analysis, researchers first investigated the conducted interviews with the elites. The content of the interviews was listened to twice in a matter of twenty days in order for the points and content mentioned by the elites to be extracted. Moreover, where there was any ambiguity in the mentioned content, calls were made with people to ask for clarification. After taking notes from the content of the interview, the researcher investigated and went through the notes for multiple times until a full understanding over the content was achieved. A period of one month was spent for reviewing the interviews which was done in two stages by the researcher. Finally, all the notes mentioned by the elites were extracted. On the next level, after investigating and mastering the content of the interviews, the researchers started to identify the elementary codes. Code one introduced the characteristics of the data which seemed to be significant and attractive by the researcher (Braun & Clarke, 2006). The researcher extracted a code for each piece of information mentioned by the interviewees. On the next level, the codes which were extracted and had the same content were integrated and formed the aspects. On this level, researchers reinvestigated the findings related to the extracted themes, and the results of the coding were adapted with the results of theme identification and academic foundations. Furthermore, map of the theme was investigated proving an acceptable and favorable structure. Ultimately, after the themes were identified and categorization was validated, themes were labeled. The content of a number of the interviews is as follows:

**Question 1: “In your opinion, how much difference is between real performance of public organizations and what stated by managers?”**

Answer of Elite #1: *“We should accept that public managers do not have a firm position, and the fear of losing the position always exists. A number are ready to defame managers with only the smallest amount of weakness. Therefore, managers possibly try to provide a favorable demonstration of their performance and hide their negative points, and stand out the positive ones.”*

Answer of Elite #2: *“Some managers personally try to grow in any way and do not hesitate to present fake statistics and deceive others. Their personality is insatiable. Unfortunately, lack of a system for evaluation of favorable performance intensifies the problem, and hardens a true diagnosis and accuracy of statistics and figures presented by the managers.”*

Answer of Elite #3: *“In our country, managers are expected to make great changes in a matter of months, and solve the problems. Such an expectation cannot be fulfilled, and if a manager promises to solve the problems in three years, it won't be accepted, while if a manager promises the same for 100 days, he has more chance to be assigned as the manager. When a manager promises to solve the problems in short period of time, and improve performance, in most cases it is not possible. Managers have to turn to demonstration of performance and manipulation of statistics and figures. That's why managers demonstrate minor and trivial issues rather than basic solution to problems, and simple problems turn into crises in the future.”*

Answer of Elite #4: *“We see that the atmosphere and culture in public organizations have undergone great changes in recent years. Public organizations normally have unhealthy atmosphere, and defamation and selling out is common among employees. Managers are no exception as well. Hence, public organization managers are compelled to present acceptable performance.”*

Answer of Elite #5: *“Morality has faded away among managers of public organizations. At the beginning of Iranian Revolution, managers had concerns about*

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*...serving people, and having personal benefits was not an issue; however, nowadays the condition has changed and for some, personal benefits are prioritized. Some of the managers shrink off their responsibility, and do not accept their weakness and deficiencies.”*

### **Question 2: “What does showcase performance mean?”**

*Answer of Elite #1: “Showcase performance is more of demonstrating the performance beautifully and notably. This beautiful and notable demonstration is not accompanied with favor and quality, and is for covering up weak points. Therefore, showcase performance can be done to better demonstrate the performance, one which is not qualified and suitable.”*

*Answer of Elite #2: “Managers in public organizations spend most of their time in meetings. When they want to report about their performance, the meetings serve as their performance, and not the outcomes and results of the meetings. Another example of this behavior is the missions which waste the organizational resources. Among some managers of public organizations, real performance is forgotten and replaced with demonstrative activities and performance.”*

*Answer of Elite #3: “Some managers in public organizations who do not have real performance try to change the reports and statistics and figures related to their performance, and to show off themselves as a skillful and qualified manager. Mostly, these managers seem successful since there is no appropriate structure to evaluate their performance, and they try to manipulate performance criteria and generalize the reports in order to avoid responsibility. That’s why we sometimes see a weak manager has been able to go up the managerial hierarchy successfully.”*

*Answer of Elite #4: “Unreal statements and promises is common among some managers. They speak about their dreams and wishes exaggeratingly rather than their own performance. It is usual and common among them to promise without thinking about realizing them.”*

*Answer of Elite #5: “Information technology and social media has entangled public managers to themselves. However, it proves useful in cases since it provides continuous communication with customers and stakeholders; however, among some others, excessive use of social media is noticed, and they make statements about whatever incident and event which may be unrelated to their organization.”*

### **Question #3: “In your opinion, what activities or statements represent showcase management?”**

*Answer of Elite #1: “One of the common behaviors among public managers is generalization instead of presenting details about their performance, and hence they cover up their weaknesses. For example, a manager may speak about having been able to decrease the expenses by five percent rather than giving details about the expense in the organizations and the resulting outcome.”*

*Answer of Elite #2: “When managers are pressed and do not have favorable annual performance, they may manipulate the reports and present figures and numbers such that the exacerbation of their financial performance. For instance, they bring the coming revenue of a future project in their current reports, or manipulate the figures and numbers. In some cases, the managers try to avoid unfavorable cases in performance in order for them not to grab attention.”*

*Answer of Elite #3: “One of the justifications of the managers about their performance is usually showing the past conditions as dark, and to assert they have had a good performance based on what they delivered at first. Clarification here is a must. In*

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*some cases, deficiencies and weaknesses are justified by external factors, and strong points are related to their own performance. There always are extrinsic factors due to disorders and instabilities.”*

Answer of Elite #4: *“Demonstrative behaviors is common among managers. It is sometimes seen that managers of public organizations speak of their wishes and dreams instead of reporting what they have done and the outcomes, and report plans that are at the planning level, and no action has been taken toward them.”*

Answer of Elite #5: *“Promising is an action some of public managers do frequently. Despite the fact that the manager himself knows what he promises is impractical or he does not have sufficient resources, he does it for pleasing others.”*

After extracting and going through the content of conducted interviews, the codes were extracted. In the following, a number of texts and extracted codes for the concept of showcase performance are included in Table 4.

<b>Interview Transcription</b>	<b>Code</b>
Focusing on the data and positive figures in reporting	“Managers try to highlight positive information about their performance for showing off, and marginalize the negative information. For example, a manager may highlight a successful project, and marginalize the weaknesses and deficiencies.”
Manipulating the structure of statistical reports	“Some managers manipulate the structure of the reports around the standards and the traditional methods of reporting to decrease the negative statistics about their performance.”
Focusing on general statistics instead of the details	“One of the common behaviors among public managers is stating general points instead of the details, and hence cover up the weaknesses. For example, a manager may declare a five percent decrease at the expenses, and digress from the details.”
Presenting reports from undone projects (or solely declared)	“It is seen that public organization managers, instead of presenting reports for what they have done and the coming outcomes, speak of their wishes and provide reports from plans which are only proposed, and no activity has been done for.
Data manipulation and making false documents in presenting performance	“Some public managers provide unreal documents and results to cover up their unfavorable performance. A spate of corruptive actions is related to making false documents.”
Changing financial reports	“Some managers are pressed and have unfavorable financial performance, and they may manipulate the reports and change the figures and numbers to cover the bad situation. For example, the revenue for a project may be obtained in a few months, yet is included in the present reports.”
Hiding negative performance information in reports	“Managers try not to report unfavorable cases of performance, or marginalize them so that they don’t grab any attention.”
Making unreal promises	“Promising is an action some managers do while they know it is not practical, or there is not adequate resource for it. It is done for pleasing others.”
Exaggerating and overstating perspectives and future	“Managers usually exaggerate about the coming future. There may be a tendency on behalf of the audience as well since they prefer boastful managers.”

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Time manipulation	“Playing with time and postponing things to a later time (e.g. two year later) is one of the ways to evade.
Projection (relating problems to external factors)	“It is seen among managers that they deficiencies and lacks are related to external factors, and strong points to their own performance. There are always external excuses for disorganizations and instabilities.”
Denigrating the past and performance of former managers	“One of the justifications of managers about their own performance is usually denigrate the past conditions and performance of former managers, and state they have good performance taking into account what they have been delivered. Transparency works at these cases.”
Doing multiple interviews with media	“Iranian managers tend to be in media, and be depicted on newspapers and media. Interviews are required; however, excessive interviews bring about negative consequences.”
Multiple agreements	“In every public organization, a number of agreements with organizations and institutions are seen, and they have not yet practically executed. It seems signing agreements is considered as an act of performance, not as an outcome.”
Multiple, fruitless work trips	“Unjustified viewing and trips are among the activities public managers tend to because of the publicity depiction and financial resources.”
Active participation in conferences	“Professional and managerial conferences are among the activities in which public managers actively participate. With respect to the higher educational degrees of managers and the tendency to seem academic and knowledgeable, they incline to such activities.”
Meeting famous people (politicians, entrepreneurs, actors, athletes, etc.)	“It is occasionally seen that public managers meet with a famous athlete and actors or takes photos with them in order for them to be depicted in media extensively.”
Meeting and communicating with other managers	“Communicating with influential managers is among the things managers try to do to show themselves and appear among high level successful managers.”
Meeting and cooperating with popular and social institutions and activists	“Managers try to develop their communication with social institutions to appear as servants who pay attention to important issues of society. Most of the meetings are limited to some photos or very limited supports, and don’t help solve problems of people.”

Table 4: A number of interview content examples and extracted codes for the concept of showcase performance

After extracting the primary codes, the codes with common or approximating concepts were integrated, and themes were formed. The results of theme analysis related to showcase performance are provided in the table. As it can be seen, showcase performance involves cognitive, communicative, and behavioral dimensions. In the present study three organizing themes and seven basic themes were identified for showcase performance. The results for theme analysis about showcase performance are included in Table 5.

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<b>Comprehensive themes</b>	<b>Organizing themes</b>	<b>Basic themes</b>	<b>Codes</b>
<b>Showcase performance</b>	Cognitive dimension	Statistics manipulation	Focusing on data and positive figures in reporting, manipulating the structure of statistical reports, focusing on general statistics instead of details, focusing on short-term and intermittent performance (instead of long-term performance)
		Information distortion	Intentional change in negative data about performance, manipulation and false documentation in presenting the performance, manipulating financial reports, presenting reports about undone projects
		Information concealment	Hiding information about negative performance in reports, dismissing documents
	Communicative dimension	Demonstrative statements	Unreal promises, exaggerating and overstating about the future and perspectives, time manipulation, purposive statements to stimulate others, dishonesty in speech, projection (relating problems to external factors), denigrating the past and performance of former managers
		Extensive media performance	Doing multiple interviews with media, statements about issues unrelated to the organization (political, social, cultural, etc.), extensive participation in social media.
	Cognitive dimension	Superficial activities	Multiple agreements, multiple daily meetings with employees, multiple fruitless trips, active attendance in conferences, national and international academic gatherings, excessive expenses, emphasizing rituals in every field
		Demonstrative relations	Meeting famous people (politicians, entrepreneurs, actors, athletes, etc.), excessive meeting and relationship with other out-of-organization managers, multiple meetings with professors and university managers, meeting and cooperating with popular and social institutions and activists

Table 5: Results of showcase performance theme analysis

Based on the findings, three dimensions including cognitive, communicative, and cognitive were identified for showcase performance. Moreover, the thematic network for showcase performance in public organizations is provided in Figure 1.

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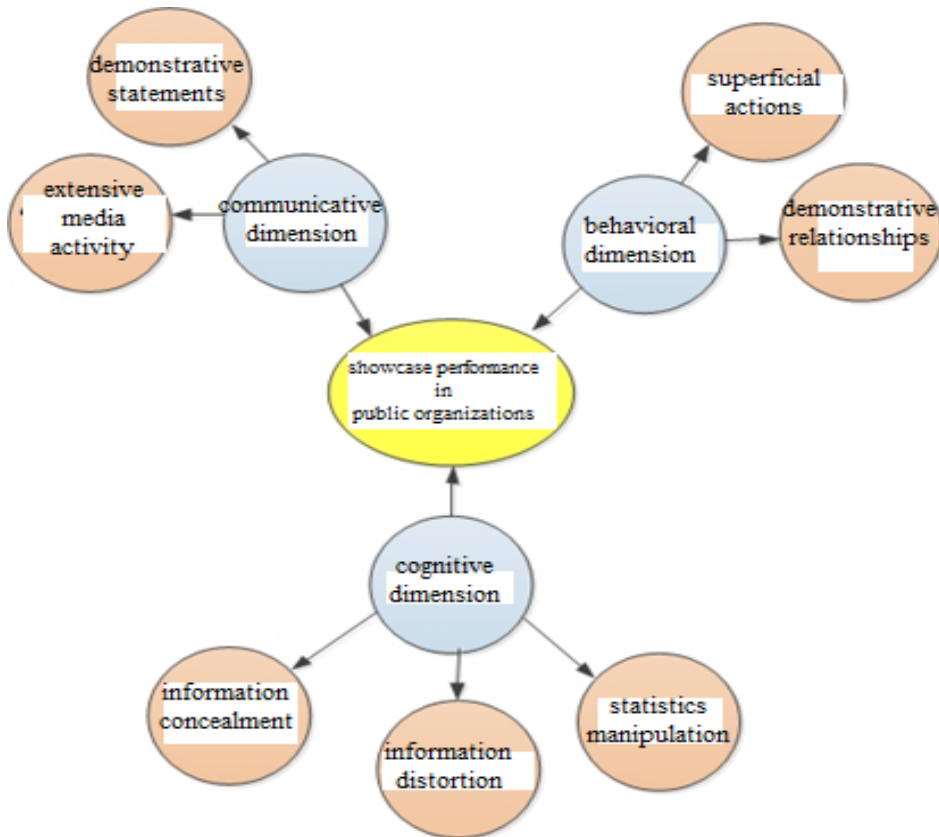


Figure 1: Thematic network for showcase performance in public organizations

After the theme analysis, the validity of qualitative phase based on validity and reliability was investigated. Merriam (2009) defines internal validity as the adaptability of research findings with realities. In the present study, and based on Merriam (2009), the researcher utilized triangulation, member checks, and bias avoidance. For this purpose, the results of theme analysis were investigated by three elite participants, and were confirmed. The results were adapted with reports from public organizations. Moreover, the researcher tried to reserve any presumption and attitude before the interviews, and only follow research procedure. At the interviews, researcher only posed the questions and avoided any personal statement and attitude in order not to direct the comments of elites.

Furthermore, Mohaghar & Sadeghimoghadam (2011) used a combination of criteria utilized in interpretive research evaluation for evaluating the reliability of data and interpretations, all of which were used in the present study to assess adequacy requirement of research procedure. The results are presented in table 6.

No.	Criterion	Concept of the Criterion
1	Reliability	A scale which shows to what extent the results of the study represent the data.

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2	Transferability	A scale which shows the extent of utilizing the research findings in similar situations.
3	Dependability	A scale which shows specificity of findings to time and place.
4	Verifiability	A scale which shows the extent to which the analysis is resulted from interviewees, and not affected by researcher bias.
5	Integrity	A scale which shows interpretations are not affected by false information or digression of interviewees.

Table 6: Results for assessing goodness of fit for the research  
(Mohaghar&Sadeghimoghadam, 2011)

Reliability is referred to as data durability during different time lengths and conditions. Reliability of the interviews are deeply affected by the coding procedure, and the high percentage of agreement in coding shows the high or low reliability of interviews. In order to investigate the reliability of the research findings, Raw Percent Agreement or Crude Association was used which is consistent with Test-retest method was used based on the following formula:

$$PAO=2M/(n_1+n_2)$$

**PAO:** Percentage of Agreement Observation (reliability coefficient)

**M:** Number of agreements in two coding stages

**n<sub>1</sub>:** Number of coded units on first stage

**n<sub>2</sub>:** Number of coded units on second stage

In the present study, four out of all interviews were chosen as samples, and each were coded over a period of twenty days for twice by the researcher. Determined codes for each interview were individually compared. In each interview, similar codes were labelled as “agreement” and dissimilar codes as “disagreement.” Reliability of the findings is included in Table 7.

Interview	Number of codes on first stage	Number of codes on second stage	Number of agreements	Number of disagreements	Reliability percentage
1	13	15	3	3	85
2	12	14	2	2	92
3	10	13	4	4	78
4	9	10	2	2	84
Total	11	13	2.75	2.75	85

As can be seen in the table, average of codes on first stage second stage, agreements, and disagreements were respectively 11, 13,10.25, and 2.75, and total reliability was 85%, and with respect to the fact that the percentage was above 70, the reliability was confirmed.

### **Results for Confirmatory Factor Analysis of Showcase Performance**

After conducting theme analysis, in order to determine the validity of showcase performance, 108 participants from managers and elites of Water and Sewage Organization were selected and questionnaires were used. The data from confirmatory factor analysis were analyzed for identified dimensions of showcase performance. In confirmatory factor analysis, the researcher aims at confirming a structural framework



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beforehand, which means he determines the relationship of each factor with a specific subcategory of variables or questions, and then tries to confirm them. After forming the model, multiple methods exist for estimating goodness of fit of the model with the data. Primarily, in order to conduct confirmatory factor analysis, it should be fulfilled that the samples have the essential adequacy. In order to validate sampling adequacy, Bartlett's test was used and KMO was calculated. The results of investigating sampling adequacy are provided in Table 8. As it is shown, KMO was more than 0.6, close to 1, and level of significance of Bartlett's test was less than 0.05, which showed confirmatory factor analysis was suitable for the structure and factor model.

KMO Test		0.824
Bartlett's test	X <sup>2</sup>	954.230
	Degree of freedom	25
	Level of Significance	0.000

Table 8: Bartlett's test and KMO Test

After confirming the adequacy of sample size, reliability and validity must be investigated. In order to investigate reliability, Cronbach's alpha and compositional reliability were calculated, and the calculated values are provided in Table 9 for model latent structures. The values of reliability are acceptable if above 0.7. As can be seen in Table 9, all model structures enjoy appropriate Cronbach's alpha and compositional reliability.

Reliability	Cognitive Dimension	Communicative Dimension	Behavioral Dimension
Cronbach's alpha	0.85	0.82	0.80
compositional reliability	0.88	0.84	0.82

Table 9: Values of Cronbach's alpha and compositional reliability

Moreover, the values related to validity were calculated for convergent and divergent validity. AVE is an index of convergent validity which shows the average of pooled variance between each structure and its indices. Simply put, AVE shows the level of correlation of a structure with its indices. The more the correlation, the more the goodness of fit. Fornell&Larcker (1981) presented AVE for estimating convergent validity, and stated that value of more than 0.5 for AVE suggests acceptable convergent validity. As can be seen in Table 10, value of AVE is more than 0.5 for all model structures, and convergent validity of all the structures are suitable.

Variables	AVE
Cognitive Dimension	0.75
Communicative Dimension	0.70
Behavioral Dimension	0.68

Table 10: AVE values

Diagnostic validity shows detailed correlation between indices of a structure and indices of other structures. For this purpose, the square root of explained variance values for each structure must be more than the value of correlation of the same structure with

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other ones. Fornell&Larcker (1981) stated that divergent validity is accepted when AVE for each structure is more than pooled variance of the structure and other structures in the model (square value of correlation coefficients among structures). In Table 11, diagnostic validity assessment matrices are presented.

<b>Dimensions</b>	<b>Cognitive</b>	<b>Communicative</b>	<b>Behavioral</b>
<b>Cognitive</b>	0.830		
<b>Communicative</b>	0.316	0.813	
<b>Behavioral</b>	0.339	0.414	0.855

Table 11: Matrix for diagnostic reliability measurement

As can be seen in the above table, for diagnostic validity, the results showed that square of calculated correlation coefficients for latent variables in pairs is less than the value of AVE average for each of the latent variables. Therefore, the research enjoys suitable diagnostic validity, and each category of components related to different latent variables (dimensions of showcase performance) independently measure a different subject. For goodness of fit for the research model, seven goodness of fit indices for latent variables were calculated which are presented in Table 12. As it is noted in Table 12, the indices are acceptable.

	<b>Cognitive</b>	<b>Communicative</b>	<b>Behavioral</b>	<b>Suitable value</b>
<b>df /<math>\chi^2</math></b>	3.76	2.31	4.01	Less than 5
<b>RMSEA</b>	0.05	0.04	0.04	Less than 0.08
<b>Average of remainders</b>	0.05	0.09	0.16	Near 0
<b>GFI</b>	0.87	0.89	0.90	Near 1
<b>CFI values</b>	0.95	0.93	0.91	More than 0.9
<b>NFI values</b>	0.90	0.88	0.86	More than 0.8
<b>NNFI values</b>	0.95	0.93	0.91	More than 0.9

Table 12: Goodness of fit indices

Ultimately, the hypotheses related to the model of factor analysis were confirmed. The most primary criterion for assessing the relationship among the structures in confirmatory factor analysis is the significance value of t. If the value of t is out of [-1.96-+1.96], the level of significance equals 95%, and if the calculated value of t is in the interval, the coefficient of the estimated path is not significant, and the hypothesis is rejected. In Figure 2, the calculated value of t for all the variables was more than 1.96. Hence, the relationship between variables and the main variable is significant, and the variables are suitable indicators of the main variable.

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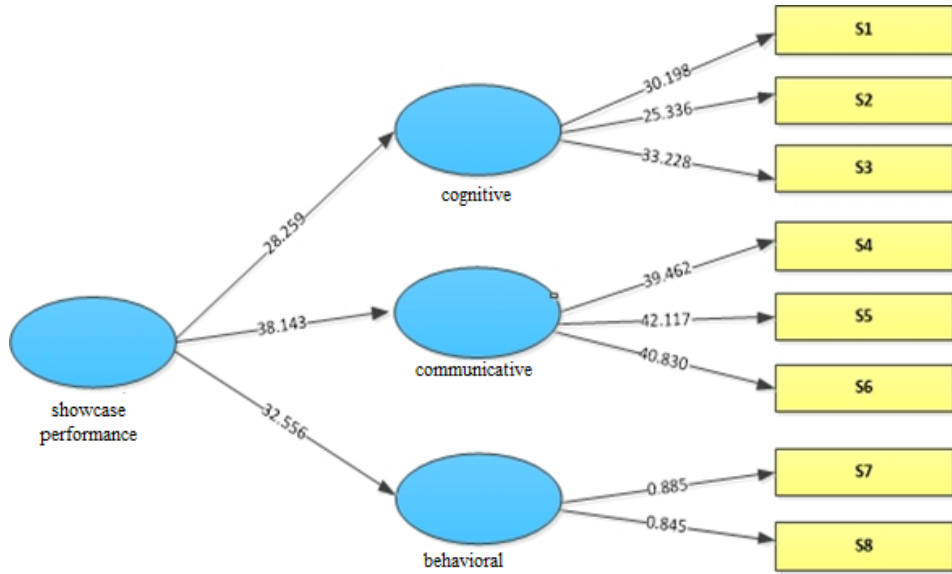


Figure 2: Fitted measurement model of showcase performance or Confirmatory Factor Analysis in Significant level

Moreover, in factor loadings standard estimation conditions, the more the value of factor loading and the more it approaches 1, the more the observed variable can elaborate on the latent variable. If the factor loading is less than 0.4, the relationship is referred to as weak, and is left aside. As can be seen in Figure 3, the factor loading of all questions is more than 0.5. Thus, indices are appropriately elaborative for the main variable.

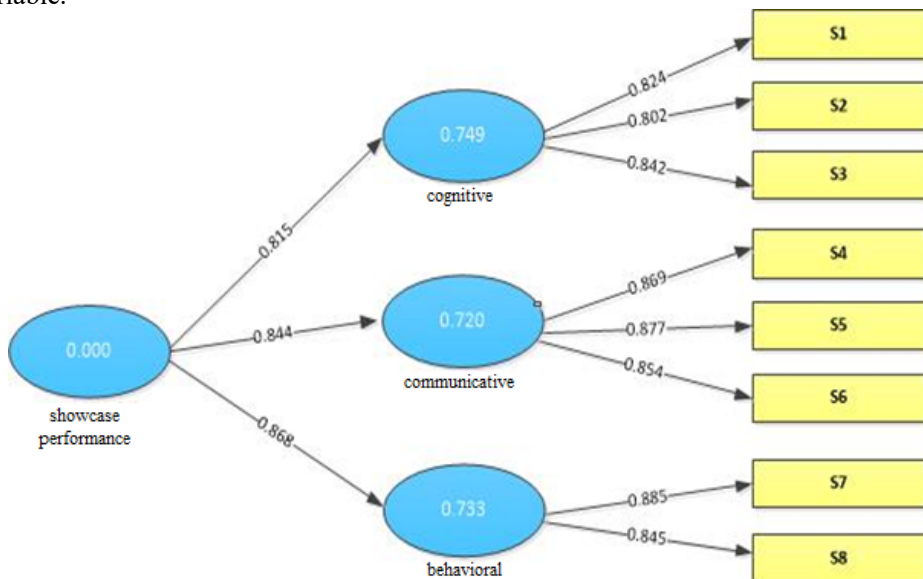


Figure 3: measurement model for goodness of fit for showcase performance using confirmatory factor analysis in standard estimation conditions

### **Discussion**

Nowadays, public organizations in Iran need to present real performance in the interest of their different stakeholders. However, it is unfortunately seen that public managers tend to demonstrate the performance and a favorable picture of it which is at times far from the reality. Showcase performance is a concept which refers to such demonstrations in presenting the performance. On the other hand, showcase performance can have positive aspects as well; however, with respect to the fact that the negative aspect is more dominant in Iranian public organizations, a model for showcase performance in public organizations was provided taking into account its negative side and conceptualizing showcase performance. Taking into account the limitations of the conducted studies about showcase performance, the results of the present study can prove important in terms of conceptualizing and determining dimensions of showcase performance insofar as the dimensions of the phenomenon were not attended in other studies, and in the present study, a specific and measureable concept for showcase performance was presented in terms of cognitive, communicative, and behavioral dimensions. In the following, different dimensions of showcase performance are investigated.

#### ***Cognitive Dimension of Showcase Performance***

Cognitive performance refers to the attempt to provide the statistics and information in order to maintain positive and favorable awareness and knowledge about the performance of organization among stakeholders, and to hide negative aspects of the performance. Statistics manipulation, information distortion, and information concealment are representations of cognitive dimension of showcase performance. Statistics manipulation is a familiar and widely-used concept in Iranian public organizations. This can be maintained in the reports published occasionally by public managers. In order to show responsible in the public eye and higher managers and to appear successful, managers try statistics manipulation. On the other hand, since there is no specific and standard for reporting performance of managers, they focus on strong points. In statistics manipulation, managers try to present positive points to stakeholders in statistics and figures. Hence, they try to provide general issues, short-term activities reports, and to present the structures and figures in a way that they are not questioned, and a favorable performance of organization is depicted.

Information distortion is wider than statistics manipulation, ad deception and fraud are dominant. In this category, data are manipulated, and statistics and figures are changed to make the performance appear favorable. Statistics manipulation was more focused on reporting method; however, it is accompanied with manipulation and fraud. A manager who tries to appear successful through changing reporting method, manipulates the information to change the indices. For example, he manipulates the expenses or revenue to achieve profiting or the least loss. The findings of the study prove themes such as intentional change in negative data of performance, data manipulation and document manipulation in performance, manipulating financial reports, and presenting undone projects for information distortion. Moreover, showcase performance happens at times with information concealment. In this case, the manager tries to hide unfavorable performance in some activities or projects, and tries to conceal the related statistics. In information distortion, the managers manipulate or change the data and statistics to hide the weaknesses. Hence, they try information distortion through document manipulation, data changing, and presenting undone projects. Based on the findings, themes such as

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concealing information related to negative performance in reports, destroying documents and reports for information distortion were identified.

### ***Communicative Dimension of Showcase Performance***

Communicative dimension of showcase performance primarily happens through statements of managers and people in organization and through public and virtual media. In communicative dimension, managers and employees of the organization try to show positive news about the organization through bias and demonstration. Communicative aspect is represented through demonstrative statements and extensive media activity. In such statements, managers try to state in a way to show their performance positive and to show a favorable and promising future for the organization. As their name suggests, demonstrative statements, indicates that the manager tries to maintain positive and favorable attitude about the organization and its future through speeches, meetings, public congregations, etc. The level of reality and achievability of the statements doesn't seem significant; the manager tends to maintain positive attitude of the audience. Nonetheless, the managers are not questioned or held credible for their statements, and are always able to justify their statements, and such issues highly affect demonstrative statements among managers. The findings of the study showed that themes of demonstrative statements include unreal promises, exaggeration in future plans and perspectives, time manipulation, purposive statements to stimulate others, dishonesty in speech, projection (relating problems to external factors), and denigration of the past and performance of former managers.

On the other hand, managers try to always be seen by stakeholders in virtual and real social media, and to publish favorable news and information about the organizations. In order to fulfill a personal private brand, they present the media from time to time, and the tendency to do so is stronger and wider among some managers, and at times the media activity becomes unacceptably excessive. However, development of social media affects vastly the expansion of media activity of managers. While the media activity was limited to press and newspapers, activity on Twitter, Instagram, Whatsapp, etc. includes most of media activity of managers nowadays. In the present study, themes such as multiple interviews with media, unrelated statements to the organization (political, social, cultural issues), and extensive presence in social media were identified for extensive media activity. It is seen in some managers that they take positions about issues that are unrelated to the activities of the organizations, and they try to appear concerned about current issues. On the other hand, it is also seen that they try to continuously keep in touch with different stakeholders through social media, and depict their favorable performance by daily reports. Totally, normal media activity is acceptable and needed for providing a positive image of the organization; however, in some cases, the activity is used to deceive the audience, which leads to multiple problems.

### ***Behavioral Dimension of Showcase Performance***

Ultimately, behavioral dimension of showcase performance deals with activities, behaviors and relationships of managers which suggest they are notable people and they have huge volume of work and meetings. Behavioral dimension includes superficial activities and demonstrative relationships. Superficial activities include those where a manager shows hard-working, active, and outstanding, and has higher level than others. Managers with unfavorable performance usually try to hide their deficiencies by superficial actions. Multiple meetings, work trips, agreements, and extravagance in expenses are among the representations of superficial actions. Moreover, a manager, through demonstrative relationships, tries to make connections with famous people,

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university professors, highly ranked managers, politicians, etc., to appear important. In other words, in demonstrative relations, the managers try to promote their credibility and brand and their organization through the people or organizations they have relations with. In superficial actions, managers try to show themselves active and able by attending different meetings and conferences. In this study, themes such as multiple agreements, multiple daily meetings with employees, multiple and fruitless work trips, attending conferences, national and international academic meetings, high expenses, and emphasizing rituals in all fields were identified for superficial actions.

Demonstrative relations are another representation of showcase performance in public organizations. Public managers are highly interested in appearing beside famous and outstanding people, and to appear more in the eye of the audience through utilizing other people's credibility and face. Themes related to demonstrative relations include meeting famous people (politicians, entrepreneurs, artists, athletes, etc.), meeting and connecting with other outer managers, multiple meetings with professors and university managers, and meeting and cooperating with popular and social institutions and activists. Meeting with famous people who are popular and well-accepted by the society leads to the managers' being known and famous. Furthermore, meeting social institutions and activists, especially those related to organization activities, promotes the brand of the manager. Additionally, meeting notable university professors and managers can indicate academic level and influence rate of managers, and hence be attractive to them. Overall, demonstrative relations, while seeming communicative, are more behavioral, and improve professional and social brand of managers.

All in all, it should be noted that showcase performance is noticeably seen among managers of public organizations. It is a multifaceted phenomenon which includes cognitive, communicative, and behavioral dimensions. On the other hand, it is affected by a number of managerial, organizational, and outer-organizational forces. The findings of the present study are in line with those of Ghorbani (2018) and Fouladi et al. (2020); however, the study was able to fill a number of academic gaps in the field of conceptualizing showcase performance and identifying its dimensions, and provide a basis for conducting future research studies.

### **Conclusion**

Showcase performance is prevalent in public organizations, and its negative aspects are primarily seen. In the present study, the identified components cover its negative aspects. It should be born in mind that managers mostly use a combination of cognitive, communicative, and behavioral dimensions of showcase performance, and the present study aimed to conduct a basic phenomenology for these issues. However, showcase performance enjoys positive aspects which can promote brand, credibility, and legitimacy of an organization. In the study, negative aspects were mostly investigated since they are more prevailing in public organizations. In the end, the results of the study indicated that showcase performance in public organizations is a multifaceted, complex phenomenon, and includes cognitive, communicative, and behavioral dimensions.

Besides developing knowledge and academic basis in the field of showcase performance, the present study provided a better understanding of the phenomenon in public organizations and academic and applied basis for managing it. Professors, researchers, and students are able to utilize the findings and results for conducting academic research in the field of showcase performance. Along with adding to knowledge of behavioral studies and managing political behaviors and organizational discord, the results of the study can form a basis for conducting extensive studies about showcase

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performance for private and non-profit organizations among professors, students, and researchers of organizational sciences. It is recommended for future research studies to investigate the effect of showcase performance as a variable on the other organizational variables, and to study the strategies for overcoming showcase performance in public organizations. Ultimately, for academic foundations, it is recommended that researchers investigate positive dimensions of showcase performance in future research for promoting organizational brand. Moreover, the main limitation of the study was generalizability of the results and findings only for public organizations, and not other ones.

### **Recommendations**

In the following, practical recommendations are included.

#### **A. Practical recommendations in managerial dimension**

- It is recommended that public managers be chosen based on their qualifications and capabilities, and meritocracy be ruled among them. Meritocracy definitely lessens the need for showcase performance among managers.

- It is recommended to conduct needs analysis about managers' training in public organizations, and theoretical and practical training must be fulfilled periodically and continuously.

- It is recommended to promote trustworthiness and social equity among people in public organizations, especially trust among managers and employees.

#### **B. Practical recommendations in organizational dimension**

- It is recommended that in public organizations, strategies and organizational goals be set and considered as the basis for reporting the performance. Moreover, the rate of realization of defined goals should be the basis for evaluation and decision-making regarding promotion of managers.

- It is recommended that performance evaluation system for managers should be set based on objective and transparent indices and be the basis for promotion of managers.

- It is recommended that regulatory actions should be set for performance of managers through regular and periodical auditing, and be the basis for performance reporting of the auditors.

- It is recommended that consistent information systems which are connected simultaneously with upper institutions should be implemented in public organizations so that managers cannot hide or distort the information and figures.

- It is recommended that the laws and frameworks for performance transparency in public organizations and reporting standards (such as financial and accounting fields) should be compiled and implemented, and managers should be required to provide performance reporting to stakeholders based on the frameworks.

#### **C. Practical recommendations in outer-organization dimension**

- It is recommended that statements and reports of public organizations to stakeholders should be investigated, and their level of adaptation with realities be determined. Determining frameworks for media activity and statements can be effective.

- It is recommended that intervention of politicians and influential people in assigning public managers should be decreased, and succession systems along with attraction and development of talents and elites for acquiring managerial jobs should be increased.

- It is recommended that media should find realities and publish the information based on real representations and provable figures.

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### **REGISTRATION FEES CEPOS CONFERENCE 2026**

**Registration fees will be paid exclusively ONLINE. All details at:**  
<http://cepos.eu/upcoming>

### **Organizing details (Conference location/ organizing details e.g. meals, coffee breaks/ mode of presentation of the papers to be announced in due time)**

The registration fee covers:

- \* Conference attendance to all common sessions, individual and special panels
- \* Conference materials (including the Book of Abstracts of the Conference)
- \* Conference program 2026 for all registered participants
- \* Certificate of attendance for CEPOS Conference 2026 (offered at the end of the CEPOS Conference 2026)
- \* Certificate of attendance for CEPOS International Associated Research Workshop 2026 (free for registered participants attending the workshop). Main topics of the panel:
  - *Policy indexation* of international journals in international databases and services;
  - *Open access* policy of the international journals;
  - *Data and statistics* within an international indexed conference;
  - Use of *online applications* for social sciences research;
  - Methods and *themes of research* provided by CEPOS (2021-2025);
  - *Publication* in an international indexed journal;
  - *Indexing and statistics* for social sciences journals in international databases;
  - *Academic profile* in international databases;
  - RSP Manuscript Submission Guidelines;
  - Publication, editing support and *citation metrics* for social sciences journals.
- \* 15 minutes Oral presentation / Poster Presentation for every author and presenter
- \* Publication of the Conference Papers in the International Indexed Journal Revista de Stiinte Politice. Revue des Sciences Politiques.

Previous publication of the 2012-2025 Conference papers is available at:  
<http://cis01.central.ucv.ro/revistadestiintepolitice/acces.php>

### **CERTIFICATES OF ATTENDANCE**

Certificates of attendance will be offered at the end of the conference.

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### **INTERNATIONAL INDEXING OF REVISTA DE ȘTIINȚE POLITICE. REVUE DES SCIENCES POLITIQUES.** Revista de Științe Politice. Revue des Sciences Politiques is an International Indexed Journal by:

ERIH PLUS

ProQuest

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CEEOL

KVK

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Index Copernicus

Georgetown University Library

Elektronische Zeitschriftenbibliothek EZB

Journal Seek

### **Latest international indexing updates 2025 (March 2025) of the *Revista de Științe Politice. Revue des Sciences Politiques* (selective list 2019-2025)**

Universität Zürich Journal Database, Switzerland

Zurich Open Repository and Archive

<https://www.jdb.uzh.ch/id/eprint/21535/>

Royal Danish Library, Denmark

[https://soeg.kb.dk/discovery/fulldisplay?docid=alma99123026492405763&context=L&vid=45KBDK\\_KGL:KGL&lang=en&search\\_scope=MyInst\\_and\\_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224x&offset=0](https://soeg.kb.dk/discovery/fulldisplay?docid=alma99123026492405763&context=L&vid=45KBDK_KGL:KGL&lang=en&search_scope=MyInst_and_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224x&offset=0)

Swisscovery, Swiss Library Service Platform (SLSP) Switzerland

[https://swisscovery.sls.ch/discovery/fulldisplay?docid=alma991170234587405501&context=L&vid=41SLSP\\_NETWORK:VU1\\_UNION&lang=de&search\\_scope=DN\\_and\\_CI&adaptor=Local%20Search%20Engine&tab=41SLSP\\_NETWORK&query=any,contains,1584-224x&offset=0](https://swisscovery.sls.ch/discovery/fulldisplay?docid=alma991170234587405501&context=L&vid=41SLSP_NETWORK:VU1_UNION&lang=de&search_scope=DN_and_CI&adaptor=Local%20Search%20Engine&tab=41SLSP_NETWORK&query=any,contains,1584-224x&offset=0)

Science On University Achievement Information System by University of Lodz, Poland

<https://son.uni.lodz.pl/.../ULbfee0e874c6a41c4a00d516e09.../>

Le réseau vaudois Renouveau Sciences et Patrimoines, Switzerland

[https://renouvaud1.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991021158885602852&context=L&vid=41BCULAUSA\\_LIB:VU2&lang=fr&search\\_scope=SP\\_Libraries\\_and\\_CDI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224x&offset=0](https://renouvaud1.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991021158885602852&context=L&vid=41BCULAUSA_LIB:VU2&lang=fr&search_scope=SP_Libraries_and_CDI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224x&offset=0)

Rebiun Catálogo de la Red de Bibliotecas Universitarias y Científicas, Spain

<https://rebiun.baratz.es/.../b2FpOmNlbGVicmF0aW9uOmVzLmJh...>

KOBV Kooperativer Bibliotheksverbund Berlin Brandenburg, Germany

<https://portal.kobv.de/simpleSearch.do?index=internal&plv=2&sortCrit=score&sortOrder=desc&hitsPerPage=&query=1584-224x&formsearch=%E2%9C%93#resultlistForm>

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Katalog der Teilbibliothek Diakonie, Gesundheit und Soziales der Hochschule  
Hannover, Germany  
<https://opac.tib.eu/DB=4.5/LNG=DU/SID=f438f44d-1/CMD...>

EP Library Catalogue – European Parliament Library Catalogue  
[https://euoparl.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991001117790704886&context=L&vid=32EPA\\_INST:32EPA\\_V1&lang=en&adaptor=Local%20Search%20Engine&tab=Everything&query=sub,exact,Europe%20de%201%27Est%20--%20Politique%20et%20gouvernement,AND&mode=advanced&offset=0](https://euoparl.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991001117790704886&context=L&vid=32EPA_INST:32EPA_V1&lang=en&adaptor=Local%20Search%20Engine&tab=Everything&query=sub,exact,Europe%20de%201%27Est%20--%20Politique%20et%20gouvernement,AND&mode=advanced&offset=0)

Ghent University Library  
<https://lib.ugent.be/en/catalog/ejn01:1000000000726583>

Universidad Carlos III de Madrid Research Portal  
<https://researchportal.uc3m.es/display/rev184334>

J-Gate Social Science & Humanities Indexed Journal List  
<https://www.kitsw.ac.in/Library/2022/JSSH%20Journal%20List.pdf>

<https://europub.co.uk/journals/revista-de-stiinte-politice-revue-des-sciences-politiques-J-11661>

Universiteits Bibliotheek Gent  
<https://lib.ugent.be/catalog/ejn01:1000000000726583>

Publons  
<https://publons.com/journal/540040/revista-de-stiinte-politice/>

Universidad Carlos III de Madrid  
<https://researchportal.uc3m.es/display/rev184334>

Weill Cornell Medicine Qatar  
[https://primo.qatar-weill.cornell.edu/discovery/fulldisplay?vid=974WCMCIQ\\_INST:VU1&docid=alma991000575074006691&lang=en&context=L&adaptor=Local%20Search%20Engine](https://primo.qatar-weill.cornell.edu/discovery/fulldisplay?vid=974WCMCIQ_INST:VU1&docid=alma991000575074006691&lang=en&context=L&adaptor=Local%20Search%20Engine)

Reseau Mirabel  
<https://reseau-mirabel.info/revue/3046/Revista-de-Stiinte-Politice>

Bond Library University  
[https://librarysearch.bond.edu.au/discovery/fulldisplay?vid=61BOND\\_INST%3ABOND&docid=alma9930197890502381&lang=en&context=SP](https://librarysearch.bond.edu.au/discovery/fulldisplay?vid=61BOND_INST%3ABOND&docid=alma9930197890502381&lang=en&context=SP)

Ghent university library  
<https://lib.ugent.be/catalog/ejn01:1000000000726583>

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The Royal Library and Copenhagen University Library Service

[https://e-tidsskrifter.kb.dk/resolve?umlaut.locale=da&url\\_ver=Z39.88-2004&url\\_ctx\\_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Actx&ctx\\_ver=Z39.88-2004&ctx\\_tim=2020-04-11T21%3A23%3A41%2B02%3A00&ctx\\_id=&ctx\\_enc=info%3Aofi%2Fenc%3AUTF-8&rft.issn=1584-224X&rft.search\\_val=1584-224X&rft\\_val\\_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Ajournal&rft\\_id=info%3Asid%2Fsfxit.com%3Acitation](https://e-tidsskrifter.kb.dk/resolve?umlaut.locale=da&url_ver=Z39.88-2004&url_ctx_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Actx&ctx_ver=Z39.88-2004&ctx_tim=2020-04-11T21%3A23%3A41%2B02%3A00&ctx_id=&ctx_enc=info%3Aofi%2Fenc%3AUTF-8&rft.issn=1584-224X&rft.search_val=1584-224X&rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Ajournal&rft_id=info%3Asid%2Fsfxit.com%3Acitation)

Glasgow Caledonian University

[https://discover.gcu.ac.uk/discovery/openurl?institution=44GLCU\\_INST&vid=44GLCU\\_INST:44GLCU\\_VU2&?u.ignore\\_date\\_cover=age=true&rft.mms\\_id=991002471123103836](https://discover.gcu.ac.uk/discovery/openurl?institution=44GLCU_INST&vid=44GLCU_INST:44GLCU_VU2&?u.ignore_date_cover=age=true&rft.mms_id=991002471123103836)

Open University Library Malaysia

<http://library.oum.edu.my/oumlib/content/catalog/778733>

Stanford University Libraries, Stanford, United States

<https://searchworks.stanford.edu/?q=469823489>

Cornell University Library, Ithaca, United States

[https://newcatalog.library.cornell.edu/catalog?search\\_field=publisher+number%2Fother+identifier&q=469823489](https://newcatalog.library.cornell.edu/catalog?search_field=publisher+number%2Fother+identifier&q=469823489)

University of Michigan Library,

<https://search.lib.umich.edu/catalog?&library=All+libraries&query=isbn%3A469823489>

Pepperdine Libraries, Malibu, United States

[https://pepperdine.worldcat.org/search?qt=wc\\_org\\_pepperdine&q=no:469823489](https://pepperdine.worldcat.org/search?qt=wc_org_pepperdine&q=no:469823489)

University of Victoria Libraries , Victoria, Canada

<http://uvic.summon.serialssolutions.com/#!/search?ho=t&fvf=ContentType,Journal%20Article,f&l=en&q=1584-224X>  
Academic Journals database  
<http://journaldatabase.info/journal/issn1584-224X>

University of Zurich Database

<https://www.jdb.uzh.ch/id/eprint/21535/>

California Institute of Technology - Caltech Library

<https://www.library.caltech.edu/eds/detail?db=poh&an=98646324&isbn=1584224X>

Staatsbibliothek zu Berlin

[http://kvk.bibliothek.kit.edu/view-title/index.php?katalog=STABI\\_BERLIN&url=http%3A%2F%2Fstabikat.de%2FDB%3D1%2FCHARSET%3DISO-8859-1%2FIMPLAND%3DY%2FLNG%3DDU%2FSRT%3DYOP%2FTTL%3D1%2FSID%3](http://kvk.bibliothek.kit.edu/view-title/index.php?katalog=STABI_BERLIN&url=http%3A%2F%2Fstabikat.de%2FDB%3D1%2FCHARSET%3DISO-8859-1%2FIMPLAND%3DY%2FLNG%3DDU%2FSRT%3DYOP%2FTTL%3D1%2FSID%3)

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Union Catalogue of Belgian Libraries

[http://kvk.bibliothek.kit.edu/view-title/index.php?katalog=VERBUND\\_BELGIEN&url=http%3A%2F%2Fwww.unicat.be%2FuniCat%3Ffunc%3Dsearch%26query%3Dsysid%3A7330250&signature=Dxe-cVFWjMO1W4HpEAWW\\_ERyKR4oiGWXLGFinWk8fNU&showCoverImg=1](http://kvk.bibliothek.kit.edu/view-title/index.php?katalog=VERBUND_BELGIEN&url=http%3A%2F%2Fwww.unicat.be%2FuniCat%3Ffunc%3Dsearch%26query%3Dsysid%3A7330250&signature=Dxe-cVFWjMO1W4HpEAWW_ERyKR4oiGWXLGFinWk8fNU&showCoverImg=1)

The National Library of Israel

[http://merhav.nli.org.il/primo-explore/fulldisplay?vid=ULI&docid=NNL-Journals003477656&context=L&lang=en\\_US](http://merhav.nli.org.il/primo-explore/fulldisplay?vid=ULI&docid=NNL-Journals003477656&context=L&lang=en_US)

Verbundkatalog GBV

[http://kvk.bibliothek.kit.edu/view-title/index.php?katalog=GBV&url=http%3A%2F%2Fgso.gbv.de%2FDB%3D2.1%2FCHARSET%3DUTF-8%2FIMPLAND%3DY%2FLNG%3DDU%2FSRT%3DYOP%2FTTL%3D1%2FCOOKIE%3DD2.1%2CE900d94f2-d%2CIO%2CB9000%2B%2B%2B%2B%2B%2B%2CSY%2CA%2CH6-11%2C%2C16-17%2C%2C21%2C%2C30%2C%2C50%2C%2C60-61%2C%2C73-75%2C%2C77%2C%2C88-90%2CNKVK%2BWEBZUGANG%2CR129.13.130.211%2CFN%2FSET%3D1%2FPPNSET%3FPPN%3D590280090&signature=OmwA\\_NLtwvdaOmmyeo7SUOCEYuDRGtoZqGXIK-vTY1o&showCoverImg=1](http://kvk.bibliothek.kit.edu/view-title/index.php?katalog=GBV&url=http%3A%2F%2Fgso.gbv.de%2FDB%3D2.1%2FCHARSET%3DUTF-8%2FIMPLAND%3DY%2FLNG%3DDU%2FSRT%3DYOP%2FTTL%3D1%2FCOOKIE%3DD2.1%2CE900d94f2-d%2CIO%2CB9000%2B%2B%2B%2B%2B%2B%2CSY%2CA%2CH6-11%2C%2C16-17%2C%2C21%2C%2C30%2C%2C50%2C%2C60-61%2C%2C73-75%2C%2C77%2C%2C88-90%2CNKVK%2BWEBZUGANG%2CR129.13.130.211%2CFN%2FSET%3D1%2FPPNSET%3FPPN%3D590280090&signature=OmwA_NLtwvdaOmmyeo7SUOCEYuDRGtoZqGXIK-vTY1o&showCoverImg=1)

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ACPN Catalogo Italiano dei Periodici, Universita di Bologna  
<https://acnpsearch.unibo.it/journal/2601620>

Bibliothèque Nationale de Luxembourg

[https://a-z.lu/primo-explore/fulldisplay?vid=BIBNET&docid=SFX\\_LOCAL1000000000726583&context=L](https://a-z.lu/primo-explore/fulldisplay?vid=BIBNET&docid=SFX_LOCAL1000000000726583&context=L)

National Library of Sweden

<http://libris.kb.se/bib/11702473>

Harold B. Lee Library, Brigham Young University

[http://sfx.lib.byu.edu/sfxlcl3?url\\_ver=Z39.88-2004&url\\_ctx\\_fmt=info:ofi/fmt:kev:mtx:ctx&ctx\\_enc=info:ofi/enc:UTF-8&ctx\\_ver=Z39.88-2004&rft\\_id=info:sid/sfxit.com:azlist&sfx.ignore\\_date\\_threshold=1&rft.object\\_id=100000000726583&rft.object\\_portfolio\\_id=&svc.holdings=yes&svc.fulltext=yes](http://sfx.lib.byu.edu/sfxlcl3?url_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&ctx_enc=info:ofi/enc:UTF-8&ctx_ver=Z39.88-2004&rft_id=info:sid/sfxit.com:azlist&sfx.ignore_date_threshold=1&rft.object_id=100000000726583&rft.object_portfolio_id=&svc.holdings=yes&svc.fulltext=yes)

Catalogue of Hamburg Libraries

[https://beluga.sub.uni-hamburg.de/vufind/Search/Results?submit=Suchen&library=GBV\\_ILN\\_22&lookfor=15](https://beluga.sub.uni-hamburg.de/vufind/Search/Results?submit=Suchen&library=GBV_ILN_22&lookfor=15)



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Edith Cowan Australia

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University College Cork, Ireland

<https://ucc.summon.serialssolutions.com/?q=1584-224X#!/search?ho=t&jt=Revista%20de%20Stiinte%20Politice&l=en-UK&q=>

York University Library, Toronto, Ontario, Canada

<https://www.library.yorku.ca/find/Record/muler82857>

The University of Chicago, USA

[https://catalog.lib.uchicago.edu/vufind/Record/sfx\\_1000000000726583](https://catalog.lib.uchicago.edu/vufind/Record/sfx_1000000000726583)

The University of Kansas KUMC Libraries Catalogue

<http://voyagercatalog.kumc.edu/Search/Results?lookfor=1584-224X&type=AllFields>

Journal Seek

<http://journalseek.net/cgi-bin/journalseek/journalsearch.cgi?field=issn&query=1584-224X>

State Library New South Wales, Sidney, Australia,

<http://library.sl.nsw.gov.au/search~S1/?searchtype=i&searcharg=1584-224X&searchscope=1&SORT=D&extended=0&SUBMIT=Search&searchlimits=&searchorigarg=i1583-9583>

Electronic Journal Library

[https://opac.giga-hamburg.de/ezb/detail.phtml?bibid=GIGA&colors=7&lang=en&flavour=classic&jour\\_id=111736](https://opac.giga-hamburg.de/ezb/detail.phtml?bibid=GIGA&colors=7&lang=en&flavour=classic&jour_id=111736)

Open University Malaysia

<http://library.oum.edu.my/oumlib/content/catalog/778733>

Wayne State University Libraries

<http://elibrary.wayne.edu/record=4203588>

Kun Shan University Library

[http://muse.lib.ksu.edu.tw:8080/1cate/?rft\\_val\\_fmt=publisher&pubid=ucypress](http://muse.lib.ksu.edu.tw:8080/1cate/?rft_val_fmt=publisher&pubid=ucypress)

Western Theological Seminar

[https://col-westernsem.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991001225541104770&context=L&vid=01COL\\_WTS:WTS&lang=en&search\\_scope=MyInst\\_and\\_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224X&facet=rtype,include,journals&mode=Basic&offset=0](https://col-westernsem.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma991001225541104770&context=L&vid=01COL_WTS:WTS&lang=en&search_scope=MyInst_and_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224X&facet=rtype,include,journals&mode=Basic&offset=0)

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Swansea University Prifysgol Abertawe

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[primo.hosted.exlibrisgroup.com/primo\\_library/libweb/action/search.do?vid=44WHELP\\_SWA\\_VU1&reset\\_config=true#.VSU9SPmsVSk](http://whel-primo.hosted.exlibrisgroup.com/primo_library/libweb/action/search.do?vid=44WHELP_SWA_VU1&reset_config=true#.VSU9SPmsVSk)

Vanderbilt Library

[https://catalog.library.vanderbilt.edu/discovery/fulldisplay?docid=alma991043322926803276&context=L&vid=01VAN\\_INST:vanui&lang=en&search\\_scope=MyInst\\_and\\_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224X&offset=0](https://catalog.library.vanderbilt.edu/discovery/fulldisplay?docid=alma991043322926803276&context=L&vid=01VAN_INST:vanui&lang=en&search_scope=MyInst_and_CI&adaptor=Local%20Search%20Engine&tab=Everything&query=any,contains,1584-224X&offset=0)

Wissenschaftszentrum Berlin für Sozial

<https://www.wzb.eu/en/literature-data/search-find/e->

[journals?page=searchres.phtml&bibid=WZB&lang=en&jq\\_type1=IS&jq\\_term1=1584-224X&jq\\_bool2=AND&jq\\_type2=KS&jq\\_term2=&jq\\_bool3=AND&jq\\_type3=PU&jq\\_term3=&offset=-1&hits\\_per\\_page=50&Notations%5B%5D=all&selected\\_colors%5B%5D=1&selected\\_colors%5B%5D=2](https://www.wzb.eu/en/literature-data/search-find/e-journals?page=searchres.phtml&bibid=WZB&lang=en&jq_type1=IS&jq_term1=1584-224X&jq_bool2=AND&jq_type2=KS&jq_term2=&jq_bool3=AND&jq_type3=PU&jq_term3=&offset=-1&hits_per_page=50&Notations%5B%5D=all&selected_colors%5B%5D=1&selected_colors%5B%5D=2)

Radboud University Nijmegen

<https://zaandam.hosting.ru.nl/oamarket->

[acc/score?OpenAccess=&InstitutionalDiscounts=&Title=&Issn=1584-224&Publisher=Elektronische Zeitschriftenbibliothek EZB \(Electronic Journals Library\)](https://zaandam.hosting.ru.nl/oamarket-acc/score?OpenAccess=&InstitutionalDiscounts=&Title=&Issn=1584-224&Publisher=Elektronische Zeitschriftenbibliothek EZB (Electronic Journals Library))

<http://rzblx1.uni->

[regensburg.de/ezeit/detail.phtml?bibid=AAAAA&colors=7&lang=de&jour\\_id=111736](http://rzblx1.uni-regensburg.de/ezeit/detail.phtml?bibid=AAAAA&colors=7&lang=de&jour_id=111736)

The University of Hong Kong Libraries

[https://julac.hosted.exlibrisgroup.com/primo-explore/search?query=any,contains,1584-224x&search\\_scope=My%20Institution&vid=HKU&facet=rtype,include,journals&mode=Basic&offset=0](https://julac.hosted.exlibrisgroup.com/primo-explore/search?query=any,contains,1584-224x&search_scope=My%20Institution&vid=HKU&facet=rtype,include,journals&mode=Basic&offset=0)

Metropolitan University Prague, Czech Republic

<https://s->

[knihovna.mup.cz/katalog/eng/l.dll?h~=&DD=1&H1=&V1=o&P1=2&H2=&V2=o&P2=3&H3=&V3=z&P3=4&H4=1584-224x&V4=o&P4=33&H5=&V5=z&P5=25](https://s-knihovna.mup.cz/katalog/eng/l.dll?h~=&DD=1&H1=&V1=o&P1=2&H2=&V2=o&P2=3&H3=&V3=z&P3=4&H4=1584-224x&V4=o&P4=33&H5=&V5=z&P5=25)

University of the West Library

<https://uwest.on.worldcat.org/search?queryString=1584->

[224x&clusterResults=off&stickyFacetsChecked=on#/oclc/875039367](https://uwest.on.worldcat.org/search?queryString=1584-224x&clusterResults=off&stickyFacetsChecked=on#/oclc/875039367)

Elektronische Zeitschriften der Universität zu Köln

<https://www.ub.uni->

[koeln.de/IPS?SERVICE=METASEARCH&SUBSERVICE=INITSEARCH&VIEW=USB:Simple&LOCATION=USB&SID=IPS3:2d1c5acebc65a3cdc057a9d6c64ce76e&SETCOOKIE=TRUE&COUNT=15&GWTIMEOUT=30&HIGHLIGHTING=on&HISTORY=SESSION&START=1&STREAMING=on&URLENCODING=TRUE&QUERY\\_a](https://www.ub.uni-koeln.de/IPS?SERVICE=METASEARCH&SUBSERVICE=INITSEARCH&VIEW=USB:Simple&LOCATION=USB&SID=IPS3:2d1c5acebc65a3cdc057a9d6c64ce76e&SETCOOKIE=TRUE&COUNT=15&GWTIMEOUT=30&HIGHLIGHTING=on&HISTORY=SESSION&START=1&STREAMING=on&URLENCODING=TRUE&QUERY_a)

[IAL=1584-224x&SERVICEGROUP1.SERVICE.SEARCH\\_EDS=on&SERVICEGROUP1.SERVICE.SEARCH\\_KUGJSON=on&SERVICEGROUP1.SERVICE.SEARCH\\_KUGUSBW](https://www.ub.uni-koeln.de/IPS?SERVICE=METASEARCH&SUBSERVICE=INITSEARCH&VIEW=USB:Simple&LOCATION=USB&SID=IPS3:2d1c5acebc65a3cdc057a9d6c64ce76e&SETCOOKIE=TRUE&COUNT=15&GWTIMEOUT=30&HIGHLIGHTING=on&HISTORY=SESSION&START=1&STREAMING=on&URLENCODING=TRUE&QUERY_aIAL=1584-224x&SERVICEGROUP1.SERVICE.SEARCH_EDS=on&SERVICEGROUP1.SERVICE.SEARCH_KUGJSON=on&SERVICEGROUP1.SERVICE.SEARCH_KUGUSBW)

## CEPOS NEW CALL FOR PAPERS 2026

EB=on&SERVICEGROUP1.SERVICEGROUP.USB:Default=on

EKP Pulications

[https://ekp-invenio.physik.uni-karlsruhe.de/search?ln=en&sc=1&p=1584-224X&f=&action\\_search=Search&c=Experiments&c=Authorities](https://ekp-invenio.physik.uni-karlsruhe.de/search?ln=en&sc=1&p=1584-224X&f=&action_search=Search&c=Experiments&c=Authorities)

Valley City State University

[https://odin-primo.hosted.exlibrisgroup.com/primo-explore/search?query=any,contains,1584-224X&tab=tab1&search\\_scope=ndv\\_everything&sortby=rank&vid=ndv&lang=en\\_US&mode=advanced&offset=0displayMode%3Dfull&displayField=all&pcAvailabilityMode=true](https://odin-primo.hosted.exlibrisgroup.com/primo-explore/search?query=any,contains,1584-224X&tab=tab1&search_scope=ndv_everything&sortby=rank&vid=ndv&lang=en_US&mode=advanced&offset=0displayMode%3Dfull&displayField=all&pcAvailabilityMode=true)

Impact Factor Poland

<http://impactfactor.pl/czasopisma/21722-revista-de-stiinte-politice-revue-des-sciences-politiques>

Universite Laval

[http://sfx.bibl.ulaval.ca:9003/sfx\\_local?url\\_ver=Z39.88-2004&url\\_ctx\\_fmt=info:ofi/fmt:kev:mtx:ctx&ctx\\_enc=info:ofi/enc:UTF-8&ctx\\_ver=Z39.88-2004&rft\\_id=info:sid/sfxit.com:azlist&sfx.ignore\\_date\\_threshold=1&rft.object\\_id=100000000726583&rft.object\\_portfolio\\_id=&svc.fulltext=yes](http://sfx.bibl.ulaval.ca:9003/sfx_local?url_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&ctx_enc=info:ofi/enc:UTF-8&ctx_ver=Z39.88-2004&rft_id=info:sid/sfxit.com:azlist&sfx.ignore_date_threshold=1&rft.object_id=100000000726583&rft.object_portfolio_id=&svc.fulltext=yes)

Universität Passau

<https://infoguide.ub.uni-passau.de/InfoGuideClient.upasis/start.do?Query=10%3d%22BV035261002%22>

BSB Bayerische StaatBibliothek

<https://opacplus.bsb-muenchen.de/metaopac/search?View=default&oclcno=502495838>

Deutsches Museum

<https://opac.deutsches-museum.de/TouchPoint/start.do?Query=1035%3d%22BV035261002%22IN%5b2%5d&View=dmm&Language=de>  
[https://opac.ku.de/TouchPoint/start.do?Branch=3&Language=de&View=thi&Query=35=%22502495838%22+IN+\[2\]](https://opac.ku.de/TouchPoint/start.do?Branch=3&Language=de&View=thi&Query=35=%22502495838%22+IN+[2])

Hochschule Augsburg, Bibliothek

<https://infoguide.hs-augsburg.de/InfoGuideClient.fhasis/start.do?Query=10%3d%22BV035261002%22>

Hochschule Weihenstephan-Triesdorf, Zentralbibliothek

Freising, Germany

<https://ffwtp20.bib-bvb.de/TouchPoint/start.do?Query=1035%3d%22BV035261002%22IN%5b2%5d&View=ffw&Language=de>

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OTH- Ostbayerische Technische Hochschule Regensburg, Hochschulbibliothek  
OTHBR, Regensburg, Germany  
<https://www.regensburger-katalog.de/TouchPoint/start.do?Query=1035%3d%22BV035261002%22IN%5b2%5d&View=ubr&Language=de>

Staatliche Bibliothek Neuburg/Donau , SBND,  
Neuburg/Donau, Germany  
<https://opac.sbnd.de/InfoGuideClient.sndsis/start.do?Query=10%3d%22BV035261002%22>

Universitätsbibliothek Eichstätt-Ingolstadt, Eichstätt, Germany  
[https://opac.ku.de/TouchPoint/start.do?Branch=0&Language=de&View=uei&Query=35=%22502495838%22+IN+\[2\]](https://opac.ku.de/TouchPoint/start.do?Branch=0&Language=de&View=uei&Query=35=%22502495838%22+IN+[2])

Bibliothek der Humboldt-Universität Berlin, Universitätsbibliothek der Humboldt-Universität zu Berlin  
Berlin, Germany  
[https://hu-berlin.hosted.exlibrisgroup.com/primo-explore/search?institution=HUB\\_UB&vid=hub\\_ub&search\\_scope=default\\_scope&tab=default\\_tab&query=issn,exact,1584-224X](https://hu-berlin.hosted.exlibrisgroup.com/primo-explore/search?institution=HUB_UB&vid=hub_ub&search_scope=default_scope&tab=default_tab&query=issn,exact,1584-224X)

Hochschulbibliothek Ansbach, Ansbach, Germany  
<https://fanoz3.bib-bvb.de/InfoGuideClient.fansis/start.do?Query=10%3d%22BV035261002%22>

Bibliothek der Europa-Universität Viadrina, Frankfurt (Oder)  
Frankfurt/Oder, Germany  
<https://opac.europa-uni.de/InfoGuideClient.euvsis/start.do?Query=10%3d%22BV035261002%22>

University of California Library Catalog  
<https://catalog.library.ucla.edu/vwebv/search?searchCode1=GKEY&searchType=2&searchArg1=ucoclc469823489>

For more details about the past issues and international abstracting and indexing, please visit the journal website at the following address:  
<http://cis01.central.ucv.ro/revistadestiintepolitice/acces.php>.

**CONFERENCE INTERNATIONAL INDEXING OF THE PAST EDITIONS  
(2014-2025)**

**CEPOS Conference 2025**

The **Fifteenth International Conference** After Communism. East and West under Scrutiny (Craiova, House of the University, 14-15 March 2025) was evaluated and accepted for indexing in 14 international databases, catalogues and NGO's databases:

Indexation links:

<https://academic.oup.com/jcs/article-abstract/67/1/csaf001/7997508?redirectedFrom=PDF>  
<https://scholarlymeet.com/events/ca73318d-42a7-4b5e-bcca-635e0aa1c46b>  
<https://conferences365.com/conferences-in-romania>  
<https://conferencewiki.com/conference-listing/MzA4>  
<https://www.conferencelists.org/event/cepos-15th-international-conference-after-communism-east-and-west-under-scrutiny/>  
<https://www.sciencedz.net/en/conference/110381-cepos-15th-international-conference-after-communism-east-and-west-under-scrutiny>  
<https://conferencealerts.com/show-event?id=262202>  
<https://conferencesdaily.com/cities/craiova>  
<https://cepos.org/upcoming/>  
<https://10times.com/after-communism-east-and-west-under-scrutiny>  
[https://www.researchgate.net/publication/379144286\\_CENTER\\_OF\\_POST-COMMUNIST\\_POLITICAL\\_STUDIES\\_CEPOS\\_Book\\_of\\_abstracts\\_of\\_the\\_14th\\_International\\_Conference\\_After\\_Communism\\_East\\_and\\_West\\_under\\_Scrutiny\\_Craiova\\_Romania\\_15-16\\_March\\_2024](https://www.researchgate.net/publication/379144286_CENTER_OF_POST-COMMUNIST_POLITICAL_STUDIES_CEPOS_Book_of_abstracts_of_the_14th_International_Conference_After_Communism_East_and_West_under_Scrutiny_Craiova_Romania_15-16_March_2024)  
<https://conferencewiki.com/conference-detail/Cepos-15th-International-Conference-After-communism-East-and-West-under-scrutiny>  
<https://www.conferencelists.org/romania/>  
[https://www.conferencesked.com/conference\\_details/10148/cepos-15th-international-conference-after-communism-east-and-west-under-scrutiny](https://www.conferencesked.com/conference_details/10148/cepos-15th-international-conference-after-communism-east-and-west-under-scrutiny)  
<https://conffinder.com/pagesconference/ConferencesListing?country=Romania>

**CEPOS Conference 2024**

The **Fourteenth International Conference** After Communism. East and West under Scrutiny (Craiova, House of the University, 15-16 March 2024) was evaluated and accepted for indexing in 11 international databases, catalogues and NGO's databases:

Indexation links:

CEEOL <https://www.ceeol.com/search/article-detail?id=1195305>  
ProQuest, Part of Clarivate  
<https://www.proquest.com/docview/2863220849/CC02F21AE4DB44F1PQ/1?accountid=50247&sourcetype=Scholarly%20Journals>  
Oxford Academic (Oxford University Press)  
<https://doi.org/10.1093/jcs/csad066>  
Oxford Journal of Church and State-Oxford Academic (Oxford University Press) (Vol. 65, nr 4/2023) în secțiunea Calendar of Events JCS (publicare 28 Noiembrie 2023)  
Conference Alerts  
<https://conferencealerts.com/show-event?id=254313>  
Science DZ

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<https://www.sciencedz.net/.../100575-14th-international...>  
10 Times  
<https://10times.com/after-communism-east-and-west-under...>  
The Free Library  
<https://www.thefreelibrary.com/CEPOS+NEW+CALL+FOR+PAPERS...>  
Conference 365  
<https://conferences365.com/.../14th-international...>  
World University Directory  
<https://worlduniversitydirectory.com/edu/event/...>  
Conferences daily  
<https://conferencesdaily.com/eventdetails.php?id=1625192>  
Gale Cengage Learning USA <https://go.gale.com/ps/i.do?id=GALE%7CA766112846...>

### CEPOS Conference 2023

The **Thirteenth International Conference** After Communism. East and West under Scrutiny (Craiova, 17-18 March 2023) was evaluated and accepted for indexing in 5 international databases, catalogues and NGO's databases:

Oxford Church & State Journal:

<https://academic.oup.com/jcs/articleabstract/65/1/168/7044222?redirectedFrom=fulltext>

10 Times: <https://10times.com/after-communism-east-andwest-under-scrutiny>

Conferencesite.eu:

<https://index.conferencesites.eu/conference/57510/13th-international-conference-after-communism-eastand-west-under-scrutiny;>

Schoolandcollegelistings

[:https://www.schoolandcollegelistings.com/RO/Craiova/485957361454074/Center-of-Post-Communist-Political-Studies-CEPOS](https://www.schoolandcollegelistings.com/RO/Craiova/485957361454074/Center-of-Post-Communist-Political-Studies-CEPOS)

Conferencealerts : <https://conferencealerts.com/showevent?id=247851>

### CEPOS Conference 2022

The **Twelfth International Conference** After Communism. East and West under Scrutiny (Craiova, 18-19 March 2022) was evaluated and accepted for indexing in 6 international databases, catalogues and NGO's databases:

<https://www.conferenceflare.com/events/category/social-sciences-and-humanities/art-history/>

Vinculation International Diciembre 2021 newsletter n 99

[https://issuu.com/fundacionargentina5/docs/diciembre\\_2021\\_fundaci\\_n\\_argentina-ai\\_ok?fr=sZjg2NjE5NTg3OTY](https://issuu.com/fundacionargentina5/docs/diciembre_2021_fundaci_n_argentina-ai_ok?fr=sZjg2NjE5NTg3OTY)

<https://www.schoolandcollegelistings.com/RO/Craiova/485957361454074/Center-of-Post-Communist-Political-Studies-CEPOS>

<https://10times.com/company/cepos>

<https://10times.com/after-communism-east-and-west-under-scrutiny>

## CEPOS NEW CALL FOR PAPERS 2026

<https://conferencealerts.com/show-event?id=238529>

<https://www.sciencedz.net/conference/82995-cepos-international-conference-2022-after-communism-east-and-west-under-scrutiny>

### **CEPOS Conference 2021**

The Eleventh International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 19-20 March 2021) was evaluated and accepted for indexing in 5 international databases, catalogues and NGO's databases:

<https://academic.oup.com/jcs/advance-articleabstract/doi/10.1093/jcs/csaa064/5941887?redirectedFrom=fulltext>

<https://conferencealerts.com/show-event?id=229654>

<https://www.sciencedz.net/en/conference/72628-11thinternational-conference-after-communism-east-and-west-under-scrutiny>

<https://10times.com/after-communism-east-and-west-under-scrutiny>

<https://worlduniversitydirectory.com/edu/event/?slib=11thinternational-conference-after-communism-east-and-west-under-scrutiny-2>

### **CEPOS Conference 2020**

The Tenth International Conference After Communism. East and West under Scrutiny (27-28 March 2020) was evaluated and accepted for indexing in 7 international databases, catalogues and NGO's databases:

Scichemistry

<http://scichemistry.org/ConferenceInfosByConferenceTopicId?conferenceTopicId=57>

Oxford Journals

<https://academic.oup.com/jcs/advance-articlepdf/doi/10.1093/jcs/csz078/30096829/csz078.pdf>

Conference alerts

<https://conferencealerts.com/show-event?id=215370>

<https://www.sciencedz.net/en/conference/57625-10thinternational-conference-after-communism-east-and-west-under-scrutiny>

Intraders

[https://www-intradersorg.cdn.ampproject.org/v/s/www.intraders.org/news/romania/10th-international-conference-after-communism-east-and-westunderscrutiny/amp/?amp\\_js\\_v=a2&\\_gsa=1&usqp=mq331AQCKAE%3D#a](https://www-intradersorg.cdn.ampproject.org/v/s/www.intraders.org/news/romania/10th-international-conference-after-communism-east-and-westunderscrutiny/amp/?amp_js_v=a2&_gsa=1&usqp=mq331AQCKAE%3D#a)

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oh=15737604302246&referrer=https%3A%2F%2Fwww.google.com&\_tf=De%20pe%20%251%24s&share=https%3A%2F%2Fwww.intraders.org%2Fnews%2FFromania%2F10th-internationalconference-after-communism-east-and-west-under-scrutiny%2F

10 times

<https://10times.com/after-communism-east-and-west-under-scrutiny>

The conference alerts

<https://theconferencealerts.com/event/46428/10th-internationalconference-after-communism-east-and-west-under-scrutiny>

Scirea

<https://www.scirea.org/ConferenceInfosByConferenceCountryId?conferenceCountryId=75>

### CEPOS Conference 2019

The Ninth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 29-30 March 2019) was evaluated and accepted for indexing in 6 international databases, catalogues and NGO's databases:

Oxford Academic Journal of Church & State <https://academic.oup.com/jcs/article-abstract/60/4/784/5106417?redirectedFrom=PDF>

10 Times

<https://10times.com/after-communism-east-and-west-under-scrutiny>

Conference Alerts

<https://conferencealerts.com/show-event?id=205682>

Researchgate

[https://www.researchgate.net/publication/327905733\\_CEPOS\\_9TH\\_INTERNATIONAL\\_CONFERENCE\\_AFTER\\_COMMUNISM\\_EAST\\_AND\\_WEST\\_UNDER\\_SCRUTINY\\_2019?\\_iepl%5BviewId%5D=sjcOJrVCO8PTLapcfVciZQsb&\\_iepl%5Bcontexts%5D%5B0%5D=publicationCreationEOT&\\_iepl%5BtargetEntityId%5D=PB%3A327905733&\\_iepl%5BinteractionType%5D=publicationCTA](https://www.researchgate.net/publication/327905733_CEPOS_9TH_INTERNATIONAL_CONFERENCE_AFTER_COMMUNISM_EAST_AND_WEST_UNDER_SCRUTINY_2019?_iepl%5BviewId%5D=sjcOJrVCO8PTLapcfVciZQsb&_iepl%5Bcontexts%5D%5B0%5D=publicationCreationEOT&_iepl%5BtargetEntityId%5D=PB%3A327905733&_iepl%5BinteractionType%5D=publicationCTA)

The Free Library

<https://www.thefreelibrary.com/9th+INTERNATIONAL+CONFERENCE+AFTER+COMMUNISM.+EAST+AND+WEST+UNDER...-a0542803701>

Science Dz.net

<https://www.sciencedz.net/conference/42812-9th-international-conference-after-communism-east-and-west-under-scrutiny>



## CEPOS NEW CALL FOR PAPERS 2026

### CEPOS Conference 2018

The Eighth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 23-24 March 2018) was evaluated and accepted for indexing in 15 international databases, catalogues and NGO's databases:

Conference Alerts, <https://conferencealerts.com/show-event?id=186626>  
Sciencesdz, <http://www.sciencedz.net/conference/29484-8th-international-conference-after-communism-east-and-west-under-scrutiny>

ManuscriptLink,  
<https://manuscriptlink.com/cfp/detail?cfpId=AYAXKVAR46277063&type=event>

Maspolitiques, <http://www.maspolitiques.com/ar/index.php/en/1154-8th-international-conference-after-communism-east-and-west-under-scrutiny>

Aconf, [https://www.aconf.org/conf\\_112399.html](https://www.aconf.org/conf_112399.html)

Call4paper, <https://call4paper.com/listByCity?type=event&city=3025&count=count>  
Eventegg, <https://eventegg.com/cepos/>

10 times, <https://10times.com/after-communism-east-and-west-under-scrutiny>  
Biblioteca de Sociologie, <http://bibliotecadesociologie.ro/cfp-cepos-after-communism-east-and-west-under-scrutiny-craiova-2018/>

Science Research Association <http://www.scirea.org/topiclisting?conferenceTopicId=5>  
ResearcherBook <http://researcherbook.com/country/Romania>

Conference Search Net, <http://conferencesearch.net/en/29484-8th-international-conference-after-communism-east-and-west-under-scrutiny>

SchoolandCollegeListings,  
<https://www.schoolandcollegelistings.com/RO/Craiova/485957361454074/Center-of-Post-Communist-Political-Studies-CEPOS>

Vepub conference, <http://www.vepub.com/conferences-view/8th-International-Conference-After-Communism.-East-and-West-under-Scrutiny/bC9aUE5rcHN0ZmpkYU9nTHJzUkRmdz09/>

Geopolitika Hungary, <http://www.geopolitika.hu/event/8th-international-conference-after-communism-east-and-west-under-scrutiny/>

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### CEPOS Conference 2017

The Seventh International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 24-25 March 2017) was evaluated and accepted for indexing in 10 international databases, catalogues and NGO's databases:

Ethic & International Affairs (Carnegie Council), Cambridge University Press-  
<https://www.ethicsandinternationalaffairs.org/2016/upcoming-conferences-interest-2016-2017/>

ELSEVIER GLOBAL EVENTS

LIST <http://www.globaleventslist.elsevier.com/events/2017/03/7th-international-conference-after-communism-east-and-west-under-scrutiny>

CONFERENCE ALERTS-<http://www.conferencealerts.com/show-event?id=171792>

10TIMES.COM-<http://10times.com/after-communism-east-and-west-under-scrutiny>

Hiway Conference Discovery System-<http://www.hicds.cn/meeting/detail/45826124>  
Geopolitika (Hungary)-<http://www.geopolitika.hu/event/7th-international-conference-after-communism-east-and-west-under-scrutiny/>

Academic.net-<http://www.academic.net/show-24-4103-1.html>

World University Directory-

<http://www.worlduniversitydirectory.com/conferencedetail.php?AgentID=2001769>

Science Research Association-

<http://www.scirea.org/conferenceinfo?conferenceId=35290>

Science Social Community-<https://www.science-community.org/ru/node/174892>

### CEPOS Conference 2016

The Sixth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 8-9 April 2016) was evaluated and accepted for indexing in the following international databases, catalogues and NGO's databases:

ELSEVIER GLOBAL EVENTS-

<http://www.globaleventslist.elsevier.com/events/2016/04/6th-international-conference-after-communism-east-and-west-under-scrutiny/>

Oxford Journals – Oxford Journal of Church & State-

<http://jcs.oxfordjournals.org/content/early/2016/02/06/jcs.csv121.extract>

Conference Alerts-<http://www.conferencealerts.com/country-listing?country=Romania>

Conferences-In - <http://conferences-in.com/conference/romania/2016/economics/6th-international-conference-after-communism-east-and-west-under-scrutiny/>

Socmag.net - <http://www.socmag.net/?p=1562>

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African Journal of Political Sciences-

[http://www.maspolitiques.com/mas/index.php?option=com\\_content&view=article&id=450:-securitee-&catid=2:2010-12-09-22-47-00&Itemid=4#.VjUI5PnhCUk](http://www.maspolitiques.com/mas/index.php?option=com_content&view=article&id=450:-securitee-&catid=2:2010-12-09-22-47-00&Itemid=4#.VjUI5PnhCUk)

Researchgate-

[https://www.researchgate.net/publication/283151988\\_Call\\_for\\_Papers\\_6TH\\_International\\_Conference\\_After\\_Communist\\_East\\_and\\_West\\_under\\_Scrutiny\\_8-9\\_April\\_2016\\_Craiova\\_Romania](https://www.researchgate.net/publication/283151988_Call_for_Papers_6TH_International_Conference_After_Communist_East_and_West_under_Scrutiny_8-9_April_2016_Craiova_Romania)

World Conference Alerts-

<http://www.worldconferencealerts.com/ConferenceDetail.php?EVENT=WLD1442>  
Edu events-<http://eduevents.eu/listings/6th-international-conference-after-communism-east-and-west-under-scrutiny/>

Esocsci.org-<http://www.esocsci.org.nz/events/list/>

Sciencedz.net-<http://www.sciencedz.net/index.php?topic=events&page=53>

Science-community.org-<http://www.science-community.org/ru/node/164404/?did=070216>

### **CEPOS Conference 2015**

The Fifth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 24-25 April 2015) was evaluated and accepted for indexing in 15 international databases, catalogues and NGO's databases:

THE ATLANTIC COUNCIL OF CANADA, CANADA-

<http://natocouncil.ca/events/international-conferences/>

ELSEVIER GLOBAL EVENTS LIST-

<http://www.globaleventslist.elsevier.com/events/2015/04/fifth-international-conf>

GCONFERENCE.NET-

[http://www.gconference.net/eng/conference\\_view.html?no=47485&catalog=1&cata=018&co\\_kind=&co\\_type=&pageno=1&conf\\_cata=01](http://www.gconference.net/eng/conference_view.html?no=47485&catalog=1&cata=018&co_kind=&co_type=&pageno=1&conf_cata=01)

CONFERENCE BIOXBIO-<http://conference.bioxbio.com/location/Romania>

10 TIMES-<http://10times.com/Romania>

CONFERENCE ALERTS-<http://www.conferencealerts.com/country-listing?country=Romania>

<http://www.iem.ro/orizont2020/wp-content/uploads/2014/12/lista-3-conferinte-internationale.pdf>

<http://sdil.ac.ir/index.aspx?pid=99&articleid=62893>

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NATIONAL SYMPOSIUM-<http://www.nationalsymposium.com/communism.php>  
SCIENCE DZ-<http://www.sciencedz.net/conference/6443-fifth-international-conference-after-communism-east-and-west-under-scrutiny>

ARCHIVE COM-[http://archive-com.com/com/c/conferencealerts.com/2014-12-01\\_5014609\\_70/Rome\\_15th\\_International\\_Academic\\_Conference\\_The\\_IISES/](http://archive-com.com/com/c/conferencealerts.com/2014-12-01_5014609_70/Rome_15th_International_Academic_Conference_The_IISES/)

CONFERENCE WORLD-<http://conferencesworld.com/higher-education/>  
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<http://knowaconference.com/social-work/>

International Journal on New Trends in Education and Their Implications (IJONTE)  
Turkey <http://www.ijonte.org/?pnum=15&>

Journal of Research in Education and Teaching Turkey-  
<http://www.jret.org/?pnum=13&pt=Kongre+ve+Sempozyum>  
CEPOS CONFERENCE 2015 is part of a "consolidated list of all international and Canadian conferences taking place pertaining to international relations, politics, trade, energy and sustainable development". For more details see  
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### **CEPOS Conference 2014**

The Fourth International Conference After Communism. East and West under Scrutiny, Craiova, 4-5 April 2014 was very well received by the national media and successfully indexed in more than 9 international databases, catalogues and NGO's databases such as: American Political Science Association, USA-<http://www.apsanet.org/conferences.cfm>

Journal of Church and State, Oxford-  
<http://jcs.oxfordjournals.org/content/early/2014/01/23/jcs.cst141.full.pdf+html>;  
NATO Council of Canada (section events/ international conferences), Canada,  
<http://atlantic-council.ca/events/international-conferences/>

International Society of Political Psychology, Columbus, USA-  
[http://www.ispp.org/uploads/attachments/April\\_2014.pdf](http://www.ispp.org/uploads/attachments/April_2014.pdf)

Academic Biographical Sketch, <http://academicprofile.org/SeminarConference.aspx>;  
Conference alerts, <http://www.conferencealerts.com/show-event?id=121380>  
Gesis Sowiport, Koln, Germany, <http://sowiport.gesis.org/>; Osteuropa-Netzwerk,  
Universität Kassel, Germany, [http://its-vm508.its.uni-kassel.de/mediawiki/index.php/After\\_communism\\_:\\_East\\_and\\_West\\_under\\_scrutiny\\_:\\_Fourth\\_International\\_Conference](http://its-vm508.its.uni-kassel.de/mediawiki/index.php/After_communism:_East_and_West_under_scrutiny_:_Fourth_International_Conference)

Ilustre Colegio Nacional de Doctores y Licenciados en Ciencias Políticas y Sociología, futuro Consejo Nacional de Colegios Profesionales, Madrid,  
<http://colpolsocmadrid.org/agenda/>.



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#### For books

Olimid, A. P. (2009a). *Viața politică și spirituală în România modernă. Un model românesc al relațiilor dintre Stat și Biserică*, Craiova: Aius Publishing.

Olimid, A. P. (2009b). *Politica românească după 1989*, Craiova: Aius Publishing.

#### For chapters in edited books

Goodin, R. E. (2011). The State of the Discipline, the Discipline of the State. In Goodin, R. E. (editor), *The Oxford Handbook of Political Science*, Oxford: Oxford University Press, pp. 19-39.

#### For journal Articles

Georgescu, C. M. (2013a). Qualitative Analysis on the Institutionalisation of the Ethics and Integrity Standard within the Romanian Public Administration. *Revista de Științe Politice. Revue des Sciences Politiques*, 37, 320-326.

Georgescu, C. M. (2013b). Patterns of Local Self-Government and Governance: A Comparative Analysis Regarding the Democratic Organization of Thirteen Central and Eastern European Administrations (I). *Revista de Științe Politice. Revue des Științe Politice*, 39, 49-58.

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