



UNIVERSITY OF CRAIOVA  
FACULTY OF SOCIAL SCIENCES  
POLITICAL SCIENCES SPECIALIZATION

**Revista de Științe Politice.  
Revue des Sciences Politiques  
No. 86 • 2025**



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**(Online) - ISSN 2344 – 4452**

**ISSN–L 1584 – 224X**

**No. 86 • 2025**

**Revista de Științe Politice.**  
**Revue des Sciences Politiques**





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Political Science Complete (accessed February 13, 2025). Database Coverage List: <https://www.ebsco.com/m/ee/Marketing/titleLists/poh-coverage.xls> (position 2765)  
Subject Social Sciences & Humanities/ Area Studies/ European Studies: <https://www.ebsco.com/m/ee/Marketing/titleLists/poh-subject.xls> (position 1634)  
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ACNP Catalogo Italiano dei Periodici  
<https://acnpsearch.unibo.it/journal/2601620>



#### Information Matrix for the Analysis of Journals

<https://miar.ub.edu/issn/1584-224X>

#### WorldCat

<https://www.worldcat.org/title/Revista-de-Stiinte-Politice-Revue-de-Sciences-Politiques/oclc/896853479>

## CONTENTS

### Revista de Științe Politice. Revue des Sciences Politiques

**RSP • No. 86 • 2025**

#### Political Theory and Social Interaction in the Digital Era

<b>Daniela Naidin,</b> <i>The Importances of Behavioral Anthropology in Class Learning Efficiency</i>	9
<b>Andra Seceleanu, Bianca Ioana Garabet,</b> <i>Communication psychopathologies in the presidential election campaign in Romania</i>	18
<b>Andrei Cristian Spulbar,</b> <i>Green Capital for a Sustainable Future: Trends and Perspectives</i>	30
<b>Anca Parmena Olimid, Cătălina Maria Georgescu, Daniel Alin Olimid, Silviu Dorin Georgescu, Cosmin Lucian Gherghe,</b> <i>Applied Digital Analysis of UN Legal Content on Humanitarian Assistance, Security and Climate Change Policy: Tracking Social Narratives, Public Engagement and Posting Behavior</i>	45
<b>Maria-Magdalena Lăpădat,</b> <i>Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes</i>	58
<b>Laviniu Costinel Lăpădat,</b> <i>Utilising Elements of Art and Literature in Teaching Romanian Culture</i>	69
<b>Daniela Isabela Scarlat, Cristina Stanciu,</b> <i>Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination</i>	81
<b>Ileana Mihaela Chirițescu, Floriana Anca Păunescu,</b> <i>Metaphor in Didactic Discourse</i>	96
<b>Adina-Loredana Dogaru,</b> <i>How micro-agenda setters acted in the 2024 Romanian presidential election campaign</i>	104
<b>Elena Maria Felea (Bochiș), Lavinia Elisabeta Popp,</b> <i>The impact of innovative methods in post-communist social assistance, for people with disabilities</i>	121
<b>Luiza-Maria Filimon,</b> <i>The Poster Child for the Radical Right Ascent: Rassemblement National and the 2024 European Elections</i>	132
<b>Diana-Maria Grosu, Virgil Stoica,</b> <i>Risks and opportunities of smart education</i>	145

<b>Cristina-Gabriela Marin,</b> <i>Idioms related to Food and Drink Used in Travelling-Related Situations</i>	157
<b>Ramona Costina Pîrvu, Constantina Alina Ciurilă (Tapi),</b> <i>The impact of digitalization on the workplaces</i>	164
<b>Cristi Spulbar, Daniela Iulia Maria Carbune,</b> <i>How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector</i>	174
<b>Aaliya Ashraf, Ulfat Andrabi, Virgil Popescu, Ramona Birau,</b> <i>Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis</i>	188
<b>Diana-Maria Grosu, Virgil Stoica,</b> <i>Teachers' perspectives on the digitalization of education</i>	203
<b>Irina Gvelesiani,</b> <i>Problematics of Translation of Some Terms Related to "Treuhand"</i>	214
<b>Andrei Cristian Spulbar, Otilia Maria Trasca,</b> <i>Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis</i>	225
<b>Aaliya Ashraf, Ulfat Andrabi, Virgil Popescu, Ramona Birau,</b> <i>Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers</i>	242
<b>Andrei Smarandescu,</b> <i>How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities</i>	258
<b>Lucian-Florin Spulbar, Lavinia-Adelina Mitrache,</b> <i>How humans and AI can thrive together in the workplace?</i>	274
<b>Lucian-Florin Spulbar,</b> <i>Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy</i>	288
<b>Otilia Maria Trasca,</b> <i>Workaholism A Bibliometric Analysis of Trends and Research Impact</i>	305
<b>Otilia Maria Trasca, Andrei Cristian Spulbar,</b> <i>Fintech's Productivity Trap: How Digital Finance Fuels Workaholism</i>	320
<b>Roxana-Mihaela Nioață (Chireac), Robert Dorin Filip, Gabriela Ana-Maria Lupu (Filip), Ștefan Mărgăritescu,</b> <i>The evolution of e-banking, its security, and its impact on the modern financial system</i>	332
<b>Shahil Raza, Aman Shreevastava, Bharat Kumar Meher, Ramona Birau, Stefan Margaritescu, Gabriela Ana Maria Lupu (Filip), Mircea Laurentiu Simion,</b> <i>Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study</i>	341
<b>CEPOS NEW CALL FOR PAPERS 2026</b>	354
<b>RSP MANUSCRIPT SUBMISSION</b>	373



## ORIGINAL PAPER

### The Importances of Behavioral Anthropology in Class Learning Efficiency

Daniela Naidin<sup>1)</sup>

#### Abstract:

The new concept of behavioral anthropology can be used in maximizing the learning efficiency by adapting teaching methods to the way a person behaves in concordance with his habits, cultural and educational background.

The objective of the study is to prove that the relationship between our behavior and personality and the way we react to the accumulation of information are connected and can have a positive impact on how students internalize the information they get in class.

As a research methodology we used the observational method that it is the primary research method in anthropology, combined with questionnaire method in order to achieve a more accurate result. The focus group have been formed by students from Pedagogy, Communication and Romanian Language Studies from University of Craiova.

The results show that when we approached our teaching method by taking into consideration the personality and character of each student, the learning results improved considerably.

The research is only the first step taken in this direction. For a more accurate understanding of this new teaching/learning approach it is necessary not only to extend the research to a wider community of students, but also to introduce this method to smaller educational classes.

**Keywords:** *behavioral anthropology, learning process, teaching methods, behavioral sciences, class efficiency.*

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Behavioral anthropology is a relatively new concept in anthropology. Although it has been used in the past, it has never fully been anchored in basic anthropological research. But, as we grow more and more interested in applying the anthropological questions of *Why, What, Who* in today's societies, behavioral anthropology becomes a resourceful tool in researching and understanding our own present inside of communities/societies.

Also, because the gap between generations has never been more abysmally than today we figured out that bringing the behavioral anthropology perspective in classes, we will be able to build a bridge that offers us the possibility to improve the learning efficiency of students/pupils.

First of all, behavioral anthropology integrates more items that help generate a pertinent conclusion at the end of a research. The main items that must be taken into consideration are cultural background, educational background, psychological status, biological particularities, experiences and interactions. Each main item has a subdivision of other important elements that provides a more detailed map of a certain behavior that arises in a certain situation.

Secondly, behavioral anthropology is a concept design to help us find answers as to why someone acts the way he/she acts at a given moment. In order to achieve that, we must not only understand how a person is built (emotionally, culturally, educationally, intellectually) but also how interaction with the given environment (people and situations) affects him/her.

Last, but not least, if classic anthropology deals mainly with societies and communities, behavioral anthropology treats an individual as a social-cultural system. It is, if we're permitted, a micro analysis of the smallest particle that creates the societies.

But why is it so important to understand someone else's reactions and attitude? Well because by doing so we can eliminate the judgmental thinking that could create a wall between us and others, wall that could prevent us from seeing maybe the true value of another person. And where if not when we try to pass on knowledge it is more important to overcome such walls.

### **Defining Today's Generation**

The kindergarten pupil enters the educational system already as a digital native and altogether, the pedagogical practice, pronunciation of knowledge forms, educational tools, mediation of the cultural heritage can become alien to them. It all seems old-fashioned and boring. This does not mean that all the pupils and students would be the same. Certain trends can, however, be observed. Individuals, who could deepen their already existing practical knowledge and skills of different practices in education and design, are not addicts of the "cool learning". Students who have accumulated theoretical knowledge, who have read the most significant texts of the by-gone times, can become strangers to the majority of the pupils. (Kuhn, 2023) Due to their overwork or lack of interest, such knowledgeable pupils do not participate in the digital society. On the other hand, digitalization can be support to the process of growing up, which makes life choices and where the first crucial choices are made that work beyond the scope of a personal life, close surrounding and family.

In discussing the influence of the digital generation on the process of university studies, academics mostly focus on whether the e-generation learners change the previous students' ways of learning, their abilities to progress logically and systematically in comprehension of the documents they study. (Aslanyan-rad, 2024). However, this

## **The Importances of Behavioral Anthropology in Class Learning Efficiency**

question disregards the fact that not only do the students change as the world around them does, the teaching procedures and the forms of mediating knowledge also change. Therefore, the accurate question towards the digital influence on educational activity should regard the concordance of changes both in the students' competency of e-perception and the ability of educators to resort to it, besides the conventional teaching displays. Restriction only to the learner bias in the net-generation discussion has led many educators to the incorrect conclusion that young learners possess a single set of innate skills that should determine teaching methodology from this point on or that a net-generation has appeared that is fundamentally different due to being born into the digital era from earlier generations (Hodge, 2017). The "net-generation" phenomenon, as it is frequently described, does not manifest itself as a set of traits independent of educational and cultural construction. There are only better Internet literate and worse ones.

The differently educated to the world around them have differently absorbed its manifestations. Thus, the rapid technical changes in the surrounding world have created a dual dichotomy: educated vs. uneducated and literate vs. illiterate. At this point, it has to be noted that the net was available in the early 1990's, and Google homepage entered the cyberspace world only in 1996. Thus, university students belong to the first academic generation to complete secondary school during the extensive outspreading and flourishing of the net, cell phones, and links. Activities such as buying a book online were unfamiliar even in the mid-1990's (Gros Salvat, 2012) Thus, the middle aged now academics have discovered the potentialities of the web in late phases of their university studies.

Nevertheless, even if they lack universal access to networks, academics made thorough use of rapidly growing computer-related technological potential before the widespread alliance of e-perceptions. Consequently, present day pupils and Germany students enter the learning institutions with different sets of pre-formed visions of Internet usage. As with educators, they themselves differently apply the exposure to the miscellaneous e-materials, which leads, for instance, to both the inquiry and e-learning university activities to different perception of web usefulness. In fine, upon this background diversification, convergence of similar web features could be observed as well.

Today's kids grow up in a world that was not known a few years before with modern technologies and the Internet. Throughout today's world, on several networks, adolescents have the chance to communicate. Observations note that at least one network has been used since the age of 3 and 4 (Naslund, 2020) Their entire life revolves on social media. Being used from a young age, this leads also to different ways of relating to the environment, communication and perception.

### **Turning points in behavioral analyses**

A study published in 2014 by researchers from Yale University shows that 6 months old babies are gifted with an evolve learning mechanism that helps them identify edible plants (AE Wertz, K. Wynn, 2014). But not everything is determined by genetics, and even what it is can be shaped. Dexter Dias argues in his book – *The 10 Types of Humans* – that even in the case of twins, genetic preferences can be shaped by proper cultural and educational environment (Dias, 2024, p. 61). Starting from what William James wrote in 1892, that our life is a mass of habits, Charles Duhigg argues in his book about the power of habit that most of the choices we make each day are not decision-making, but they are habits. His point is sustained by a study published by the Duke

University in 2006 which showed that 40% of the actions people performed each day weren't actual decisions, but habits (Duhigg, 2022, p. XVI).

Motivation is a key component of performance, but motivations are usually unconscious. Multiple studies have revealed that there are three key motivations that drive performance: achievement, power and affiliation. Another unconscious process that influences our behavior is the emotion factor. Emotions can be a powerful motivating force; they are a spontaneous biological process that is most of the time out of our control and they can be very good messages transmitted to others. The emotions we receive from others we interpret based on our own experiences and cultural background (Al-Hoorie, 2019).

The effect that family structure has on the economic, social, and political world is evident in different sociopolitical and cultural contexts across Europe, the Middle East, and Africa. The adaptability and resilience of such effect is commendable, considering the long timelines and geography across which it has been observed (Martinez, 2018). Nonetheless, several concepts have been suggested to account for the way demographic traits shape material, social, and political behavior. Since the moment a child is born, parents, teachers, priests, and media carry out the process of socialization in accordance with social norms, morals, and values. This can create stereotypes which are a "widely held but fixed and oversimplified image or idea of a particular type of person or thing" (Plaisance, 2018). Cultural norms are the unwritten rules that guide social conduct within a cultural system. They define what is considered acceptable behavior and outline the boundaries of privilege and decorum in a given society. Cultural values are the more subtle beliefs that underpin these norms.

Human behavior is a complex interaction of biological, environmental, social, and psychological influences. For centuries, scientists have attempted to understand the relationship between biology and behavior. Today we know that one's genetic makeup, physiology, psychopathology, and neurochemistry influence human behavior. Individually, each area of study is not without controversy, but together they provide a powerful argument for the biological mechanisms that underlie many of our most common human behaviors. Clinical and counseling psychiatry, psychology, social work, and nursing are professional fields that are based, in part, on basic biological principles.

Jordan Peterson emphasize for instance that mythological representations could be constituents for elements of experiences. He argues that "the world as forum for action" comprises three constituent elements and experiences and a fourth that precedes them. According to him, those are: the unknown, the knower and the known; the indeterminate preceding their emergence serves as the ultimate source of all things (Peterson, 1999)

Social interactions unfold via a complex, sequential interplay of behaviors between two or more interacting individuals. In human-human interactions, many of these behaviors are nonverbal and can be observed by monitoring a person's movements, gaze, and posture. Furthermore, an individual's gestural behavior can be initiated/concluded by other behaviors; for instance, a person is more likely to speak while gazing at the recipient of their speech. Automatically detecting these characteristic interactions is a challenging task, as they are buried within and dispersed across multidimensional behavioral sequences, are bulky and involve many interacting individuals. Interactions in a stable group are carried out frequently, behavior is frequently repeated structure scale-free networks of interaction between individuals, with few individuals participating in many interactions and many in a few. There is a multiple layer of challenges: individuals are not in a controlled environment; they can communicate in multiple ways at the same time and

## **The Importances of Behavioral Anthropology in Class Learning Efficiency**

can engage in different more dynamic interactions, among many others. New technologies, including wearables, video tracking, and miniaturized cameras in combination with machine learning approaches and mathematical methods from game theory, now permit us to investigate how the sequences of interactions among individuals define their success, and how social behaviors can be predicted from past interactions. (Smith, 2020)

Social interactions are fundamental for humans, as they are context for the development of individuals, their emotions, behaviors, and thoughts. They are crucial for success in establishing meaningful interactions that provide psychological and material support (Vinciarelli, 2017). It is through interactions that empathy and altruism can be developed, as well as skills to understand others. Despite the importance of interactions, the information they carry has increasingly been of interest to different research areas. One of the reasons is that face-to-face interactions are ephemeral, and their detailed analysis is both costly and difficult. However, with the technological advancements of the past two decades, vast amounts of conversational multi-modal human interaction data have been collected. (Beyan, 2023). Such conversations are mediated by various synchronous communication technologies, such as digital voice transfer, with the young shifting almost completely from voice transfer to text and voice on social media. The main aspect of such technologies is that being technological in nature, they inhibit the use of almost all non-verbal signals. This is a crucial issue because it is noted that about 25% of the time is spent on interaction and enquiring during a phone call, a significant part of which is accounted by non-verbal signals (Ruben, 2021).

### **Methodology**

We began by collecting background intelligence about our students through the method of observation and through questionnaires. The focus group was formed by students from Pedagogy in third year of study, Communication and Public Relations first year of study, and Romanian literature – second year of Master. Anthropological behavioral profile was created at the beginning of the semester. In order to do that we gather intelligence about their age, where they are originally from, what were their preferences regarding food, sports, music, films, hobbies, leisure. We also inquire about what social media they prefer or if they use any of it.

After we established the profile for each individual, we tried to shift the course content to each one of them and see whether their interest to the content or their acquisition of knowledge increased. That was done by establishing the level of knowledge and interest in the beginning of the class and afterwards using the same parameters, measuring it at the end.

The best result was through a series of exercises that we proposed to the class. The data we will present you will be grouped by each field in part.

### **Data collection**

#### **Group A – students from Pedagogy**

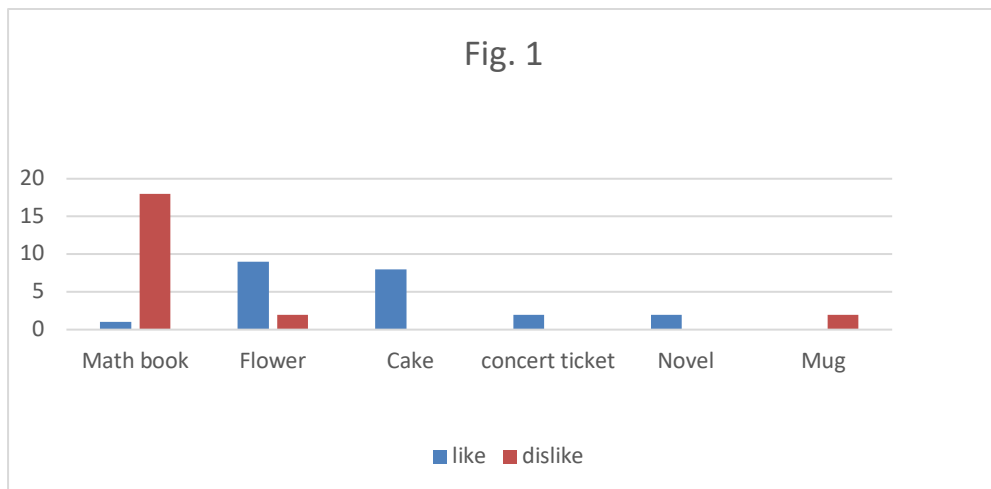
During the Didactics of History class, we asked them to tell us if they liked history in high school. Of 32 students, only two admitted having enjoyed history, all the other 30 saying that they didn't. When asked why, they answered that they were obliged to learn by heart dates and events with no context what's so ever. So, because we already had their anthropological behavioral profile, during the semester we tried to personalize the content

according to their preferences and character. For instance, each student had to do a project about the history of a subject they enjoyed: football team, music, favorite influencer, favorite movie or TV show etc. Another assignment was to research and present, if they want to the class, some details about their place of birth or family. If in previous years when students were asked to do research in the field of history from pre-established topics, they were not interested in presenting it to others, this time all the students expressed their intention of presenting it. Moreover, all the works were original, no copy paste being detected.

At the end of semester, we asked them to write on a piece of paper if they like history. No name was required to be on the paper. All the answers were positive, some of them stating that they didn't know history can be fun or useful, but now they find it interesting, one of the students even used the term amazingly.

Another exercise that we did with the students from Pedagogy was during the Nonformal Education and Community Development class. One of the aspects that raise concerns in nowadays society is the lack of interest among the citizens in voting. The classic speech of how important it is to exercise this right, how ancestors have lost their life in order for us to all have this right, leaves people usually indifferent. So, we designed an exercise that would help students to realize the importance of the voting process by appealing to something they could relate faster based on their own feelings and preferences.

We divided the class – 22 students - into two rows and asked everyone to choose from a group of items what they would like to receive as a gift and what they would hate receiving. The items they had to choose from were: math book, a novel, a flower, a mug, a classic concert ticket, and a cake.



As seen in the previous graphic, the results showed they would prefer to receive a flower, and they would dislike receiving a math book. After this stage of voting, we told them that each of them would receive one of the items – flower or math book – and that the ones that receive the math book would have to resolve all the exercise inside and the ones with flowers should manage to keep them alive for 2 months. If so, they would receive points for the exam. However, the one who will have the right to choose who gets

## **The Importances of Behavioral Anthropology in Class Learning Efficiency**

what is only one of the two rows. The students in the selected row will vote what item goes to who and the ones that do not vote now only have to accept the decision made by their peers. Of course, the ones that didn't get to vote in the second part were upset and said it is not fair they have to accept a decision that influences their life (points to the exam) without expressing their will. That was an excellent reaction, and we explain to them that when you do not exercise a right is like not having it, so even if the political elections might seem like something it doesn't affect you, in the long term the political actors involved make decisions that will affect you in some way. Being just an exercise, they were happy they didn't actually have to do math exercise, but we emphasize on remembering how they felt when they thought they have to do it.

The second part of the exercise focuses on how nowadays people tend to separate from friends and family based on their preferences (whether political views or sport options or anything else). So, we took an example using the *reductio ad absurdum* method. One of their colleagues was allergic to perfumes. We asked them to imagine there are two candidates and that one of them promises that if he is elected, he will oblige everyone not to wear perfume. The other candidate promises that he will give free perfumes to everyone. For the colleague that is allergic to perfumes doesn't even matter what else they promise. If one of them intends to do something that is not suitable for her personally, then she will not vote for that person. However, this doesn't make her a bad person, doesn't change who she is and obviously if you liked her before for her character, personality, abilities and so on, all that will remain the same regardless of whom she chooses to vote for.

### **Group B – Students from Communication and Public Relations**

For the students from Communication, we asked them during the Introduction to Anthropology class to exercises the main method of research in anthropology – the observation. But we gave them free choice according to their abilities and passions in doing so. The assignment was to observe the Christmas fairy in Craiova and to present their findings, but the presentation could be under any form they wished. The results were amazing. Two of them, which were passionate about photography, took pictures and explained to the class what they observe through the images. Another student which was preoccupied by fashion focused on how people dressed when visiting the fairy. We also had one student with amazing drawing talent which drew what he thought was relevant. Another one, fond of literature, wrote a ten pages essay about how people act during the fairy. Regardless of what they used to observe and to present the data they collected, the fact that they could appeal to their skills made them interested in the subject and succeeded in putting into practice information they receive in class.

### **Group C – Students from Romanian Literature Master**

With the students from Romanian Literature, which were in the last year of Master, we had an optional course about *History of Ethnoanthropological Theories*. Not being part of the main body courses of their major, it was even more important to get their attention. So, after we got to know them a little bit, we proposed to them to apply the knowledge from the course aka the anthropological theories we were speaking about to their favorite novel and try to understand the societies and the communities or even the characters through an anthropological view.

Because we noticed that many of them liked Mircea Eliade (11 out of 16) and some of them (3 out of 16) were passionate about Indian culture, I choose to present them

an analyze of Indian culture through two perspectives: Eliade's point of view from *Maitreyi* and Maitreyi Devi's point of view from *Love doesn't die*, showing them how the same place at the same time can be perceived different mostly due to cultural differences.

Being able to choose a novel they enjoyed and combining new techniques of interpretation resulted in a mass interest in the class subject and even two of the students decided to write their final thesis on subjects from this course.

### Conclusions

Today, more than ever, it seems like the gap between generations gets bigger and bigger. We are like two different cultures that struggle to find the right translation. We can do that by understanding each other and that is possible through anthropological means. Think at all the so-called strange customs or traditions you have learned from different cultures and remember how you felt when you saw people acting different from what you used to do. It is the same with the young generation. Their environment and their values are shifted differently than ours. We must find a key to unlock communication. When you interact with someone from a different culture, it is not enough to understand the words, you have understood the customs and traditions in order to have good communication with that person because what could be an insignificant gesture for you could be a horrible insult for the other person or the other way around. And all that could end up in losing a good friend or worst, just because a behavioral act was misunderstood.

Also, to maximize the learning in a class it is important to know how every student (especially in lower classes) gives the best performance. There are people that work better in the morning, others at noon, some may be able to focus if the information is accompanied by pictures and so on. This is why the research presented in this study is just the first step in defining this technique. We are focusing on studying whether behavioral anthropology works its best in kindergarten and undergraduate school. For instance, a method that uses part of this theory is the step-by-step method in primary school. What the behavioral anthropology concept proposes is that we have tools to make the learning process more efficient regardless of the main method of studying.

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### Article Info

*Received:* March 25 2025

*Accepted:* May 15 2025

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#### How to cite this article:

Naidin, D. (2025). The Importances of Behavioral Anthropology in Class Learning Efficiency. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 9 – 17.



## ORIGINAL PAPER

# Communication psychopathologies in the presidential election campaign in Romania

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### Abstract:

This paper aims to investigate how communicational psychopathology influenced the 2024 presidential campaign in Romania, focusing on regulatory controversies and the role of TikTok platform in disseminating political messages. In the context of electoral competitions increasingly dominated by the online environment, this study analyzes how manipulation techniques and self-presentation tendencies affect public perception and trust in the democratic process. The research highlights that, in the 2024 electoral campaign, communication strategies were amplified by legislative controversies regarding online content regulation, particularly on TikTok, where highly emotional messages were spread rapidly, sometimes in a distorted or alarmist manner. The situation created a climate of uncertainty among voters, who faced a massive flow of information, often designed to induce panic and social division, ultimately leading to a crisis of trust in the state institutions. The analysis focuses on how manipulation strategies and the tendency for artificial self-presentation – also described through the concept of Spectacle 2.0 – are often designed to generate intense emotional responses by using fear-inducing and divisive techniques, which influence electoral decisions and public perception. Through this integrated approach, the paper seeks to highlight how information manipulation and distorted self-presentation contribute to cognitive dissonance and a crisis of trust in the democratic process, emphasizing the need to promote ethical and transparent communication practices to strengthen public dialogue.

**Keywords:** *Manipulation, Political Influence, TikTok, Democratic Trust.*

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## **Communication psychopathologies in the presidential election campaign in Romania**

### **The psychopathology of communication in election campaigns**

The psychopathology of communication in electoral campaigns can be analyzed through the strategies used in negative campaigning, particularly in relation to information manipulation and the increasing influence of social networks in shaping public opinion. Negative campaigning, especially in Romania, has been used as a common tool to discredit political opponents since the end of communism, particularly during Ion Iliescu's presidential campaigns in the 1990s. During that period, direct messages and personal attacks against opponents were used to shape public opinion. These tactics may be regarded as manifestations of communication pathology, because they express an intention to manipulate, aiming to distort reality and construct a false image of political adversaries (Mureșan, 2022). In the 1990 election, Iliescu and his supporters made negative propaganda against the opposition; a notable example was the “Mineriads” event, where miners were mobilized to suppress anti-FSN protests, portraying the opposition as “enemies of the people”. The campaign also employed fear-based messages, warning of a potential return of the “bourgeoisie” and insinuating that opposition parties intended to restore a capitalist system that would deprive workers of their rights.

The concept of „psychopathology” in political communication refers to the totality of strategies used by political parties or candidates to resort to manipulative and misleading discourse, aiming to instill fear, confusion, social fragmentation, and emotional influence over the population. These strategies are present in most international political scenarios, reflecting a global trend toward manipulative communication techniques to shape public opinion (Almela et al., 2015).

The manipulation of subliminal messages has thus become a primary tool in shaping public opinion, often used unethically. A functional democracy relies on equal access to voting and the protection of rights for all citizens. However, the importance of citizens exercising this right in a responsible and informed manner cannot be overlooked (Shobahah, 2022). Informed voting contributes to the selection of political leaders who genuinely reflect the needs and interests of society. When citizens base their decisions on incomplete, distorted information or momentary emotions, there is a high risk that elections will be swayed by populism, disinformation, or manipulation. This phenomenon may lead to the support of inefficient or even harmful policies in the long term. Responsible and informed electoral participation ensures a balance between voting rights and the ability to critically evaluate candidates and political parties, analyze electoral promises, identify manipulation tactics, and to make choices that serve the general interest of the population rather than impulsive emotions or external influences.

Nowadays, Social Networking Sites (SNS) play an important role in facilitating political discourse due to their characteristics: rapid information dissemination, free expression of opinion, and, at the same time, the swift spread of false information and manipulative messages. Social media enables direct interaction between voters and candidates. However, this accessibility creates an opportunity for psychological manipulation through highly sophisticated electoral micro-targeting techniques. This phenomenon is made possible using Big Data, which allows the collection and analysis of vast amounts of user information, including preferences, online behavior, interaction patterns, and even emotions and attitudes expressed through posts, likes or comments. By using this data, candidates can tailor their communication strategies and construct personalized messages directed at specific target groups, maximizing the impact of political campaigns.

The heterogeneity of the electorate requires the use of a flexible and adaptive

communication strategy that can attract various social, cultural, and ideological segments of people. Political storytelling and emotional reasoning are essential in shaping candidates' public images and establishing affective relationships between voters and candidates (Trexler, 2023). Persuasion strategies are built on psychological principles that target individual cognitive processes and the social dynamics of groups. These strategies are designed to stimulate social identification, reinforcing a sense of belonging to a political group and strengthening political loyalty. Social identification, as defined by social identity theory developed by sociologists Tajfel and Turner, explains how people define themselves in relation to the groups they belong to. In the political context, the strategy of making people or a group of people identify with the candidate is essential because individuals tend to adopt opinions, attitudes, and behaviors consistent with their reference group. Consequently, electoral campaigns use persuasive messages to create or amplify this sense of belonging through symbols and narratives that emphasize the distinction between "us" and "them." Group identity is reinforced through manipulation strategies such as appeals to shared values, constructing discourse based on external threats (real or perceived), and promoting a sense of solidarity.

At the core of these phenomena are psychodynamic processes, including internal conflicts and unconscious defense and projection mechanisms, which influence how individuals process electoral information. One significant concern is the vulnerability of democratic processes to external influences, such as corporate funding and control over social media, which can affect the fairness of electoral campaigns (Shapiro, 2024). Social networks enable the manipulation of information through personalized recommendation algorithms, targeted advertising, and the spread of misinformation. These mechanisms can distort voters' perceptions, limit the access to objective information, and ultimately, impact democratic decision-making. Comparative analyses of electoral discourse highlight differences between candidates, showing how variations in rhetorical style, argumentative strategies, and linguistic techniques influence how electoral messages are perceived by the public, shaping their appeal and impact on voter opinion (Hargrave, 2022).

### **Communication psychopathology in the Romanian electoral campaign**

If we look at the way the presidential election campaign in Romania unfolded in 2024, we can observe the complex dynamics between negative campaigning, media manipulation (framing) was carried and persuasion strategies. Media manipulation, in this case, was carried out through social media, the so-called "framing", where social networks played an important role, presenting the candidates and their election campaign events in a favorable manner that influenced public perception. Additionally, negative campaigns were more present, as candidates tended to promote content attacking their opponents rather than debating electoral programs, trying to influence voters to vote against a candidate rather than for one. Candidates resorted to self-promotion methods and mutual attacks, building a strategic narrative meant to strengthen their own image while undermining their opponents (Botaş, 2024; Lefébure, 2020).

The framing process, in this context, mediated the communication of results to emphasize the rise or decline of a candidate, influencing public perception. In many cases, social networks contribute to constructing an image of "artificial" credibility and popularity. Political debate, in this sense, risks being overshadowed by an unfair competition where electoral programs and individual qualifications are relegated to the background. This tendency contributes to the superficialization of electoral discourse,

## **Communication psychopathologies in the presidential election campaign in Romania**

transforming the election campaign into a battle of media perceptions rather than a democratic process based on political analysis and fairness (Susilawati et al., 2024).

The use of ambiguous speech and misleading arguments in electoral discourse has contributed to the erosion of public trust in political institutions and manipulation of voter behavior. On social networks, this trend is amplified, as candidates build their public image based on the elements they choose to expose, avoiding aspects that could affect their credibility. They adopt carefully calibrated self-disclosure strategies, where posts and messages are filtered and optimized to create a favorable political identity. This dynamic complicates voters decision-making process, as they are bombarded with a large amount of carefully selected and manipulated information rather than having access to an authentic and balanced debate (Ene, 2019). This reality highlights the challenges of political communication in Romania, where the struggle for power often prioritizes image over substance (Rus, 2016).

The 2024 presidential elections in Romania marked a new phenomenon, a shift in the political landscape through the rise of an independent candidate. In a historical context, from the fall of communism to the present, political parties such as PSD and PNL have always demonstrated their power, reaching the second round of elections. However, this year, in the presidential elections on November 24, 2024, things were different. According to the ROAEP website, an independent candidate managed to reach first place in the elections, with a share of 22.94%, representing 2,120,401 votes from Romanians. Following this candidate was the USR candidate, with a percentage of 19.17%, representing 1,772,500 Romanians. In this context, PSD ranked third, while PNL ranked sixth. The voter turnout was 52.52% of the total population (ROAEP, 2024).

Analyzing the election results, an atypical situation was observed, generated by the success of an independent candidate. This candidate adopted a different electoral campaign strategy, conducted on the TikTok platform, which caused nationwide confusion. According to data provided by DataReportal in 2024, Romania had 18.06 million internet users, of which 13.30 million, approximately 67.4% of the population, were active on social platforms. Regarding the TikTok platform, figures provided by ByteDance indicate a number of 8.97 million active users over the age of 18. These data suggest that advertising on the TikTok social platform reached 56.3% of Romania's adult population. Social platforms have democratized access to communication, allowing candidates to interact directly with a large audience through short, engaging videos with emotional impact. The platform's personalized recommendation algorithms played a significant role in electoral promotion, increasing the relevance of the election campaign. Thus, the TikTok social platform was transformed into a political communication platform, reflecting politicians' adaptation to new media channels. By attracting a large audience, the platform has become a space for promoting election campaigns, prompting candidates to use all available levers to promote their messages (Cervi et al., 2023).

The electoral success of the independent candidate can be attributed to the way his electoral communication activated primary emotions such as fear, anger, or frustration. These emotions are amplified through rhetoric based on identifying a common enemy (ex: political elites, the European Union, NATO) and offering simple solutions to complex problems. According to social psychology theory, polarizing discourse creates a dualistic "us" versus "them" thinking framework, promoting a sense of identification with a leader perceived as authentic, capable of expressing collective discontent without fear. In Romania's context, voter absenteeism, distrust in political parties, an educational deficit, and lack of critical thinking were favorable factors for internalizing such discourse.

Citizens' loyalty was achieved through appeals to conspiracy theories, a cognitive mechanism that reduces anxiety by providing easy explanations for any insecurity or questions. Conspiracy theories offer an illusory perception of control and justify social dissatisfaction, forming a foundation for building a loyal electorate.

Social media recommendation algorithms favor media content with a high degree of emotionality, explaining the rapid virality of a discourse based on riot, frustration, and appeals to sovereignty. Promotion strategies carried out on the TikTok social platform contributed to amplifying this phenomenon, influencing users through the dissemination of short, emotionally impactful, and visually appealing messages. The lack of strict regulations on electoral campaign financing affected the transparency of the electoral process and external influences on the election results. Research in political psychology highlights that citizens' frequent exposure to alarmist and extremist messages fosters the development of a rigid cognitive framework, characterized by dichotomous thinking and a reduced ability to critically analyze information. Cognitive rigidity is associated with an increased need for epistemic certainty, making extremist ideologies more attractive because they offer clear answers to societal problems (Prooijen & Krouwel, 2022). Overall, the interaction between cognitive rigidity and political extremism underscores the necessity of understanding these mechanisms to combat misinformation and promote critical thinking in political discourse (Costello et al., 2023).

### **Self-disclosure and social platforms**

The rise of social network sites (SNS) has revolutionized social interaction, transforming the way individuals present themselves to others and interact socially. Social platforms launched after 2003 provide users with opportunities for personal expression, social comparison and relationship maintenance (Boyd & Ellison, 2007). These platforms facilitate visibility, self-assertion and online self-presentation. Thus, they have also been used in the 2024 electoral campaigns, helping to spread political messages and mobilize voters, changing the way electoral campaigns are conducted.

Carr and Hayes (2015) define social networks as "internet-based channels that allow users to interact opportunistically and self-present selectively, either in real-time or asynchronously, to both large and restricted audiences, and that derive value from user-generated content and the perception of interaction with others."

Beyond the ability to stay in touch with friends, the main reasons these tools have gained such popularity are impression management and entertainment (Krämer & Winter, 2008; Neubaum & Krämer, 2015). In electoral campaigns, these motives become strategic tools for influencing voters. Social comparison and self-disclosure, essential factors in interaction on social platforms, are manipulated to influence public opinion. For example, candidates resort to "strategic self-disclosure" on social platforms and share only the most favorable aspects of themselves, leading users to engage in upward comparison with these figures (Liu et al., 2016).

Interpersonal communication must be reanalyzed in the context of new technology-mediated communication channels, considering the attributes of online interaction compared to face-to-face interaction (Rubin, 1994). Online communication facilitates social support and empathy (Preece, 1999; Wright, 1999, 2000, 2002) but leads to the loss of nonverbal cues, which are essential for correctly interpreting messages (Frith, 2009). In electoral campaigns, the absence of nonverbal cues and the controlled self-disclosure environment can be used to manipulate citizens' emotions, utilizing carefully crafted images and messages to generate emotional reactions.

## **Communication psychopathologies in the presidential election campaign in Romania**

Studies suggest that interaction and communication through social platforms generate more extreme impressions than face-to-face communication (Hancock & Dunham, 2001) and can lead to distorted perceptions, inconsistent with the reality of candidates. This dynamic is intensified in electoral campaigns, where users are constantly exposed to personalized media content filtered through recommendation algorithms to reinforce certain political beliefs.

Research shows that public opinion is influenced by how individuals self-disclose on social platforms, shaping users' perceptions. Online self-presentation, especially through visual media content, is most used by political candidates. They strategically use images to project either a friendly or serious demeanor, depending on the intended message, enhancing credibility and fostering connections with users (Haim & Jungblut, 2024). The strategic use of social networks by candidates, including personalized messaging and active audience engagement, has proven to be a mobilizing factor for voters and an element that can influence public perception, affecting electoral outcomes (Ardiansyah & Muhaimin, 2024).

Influencers are ever-present in this context, and their role in shaping public opinion highlights the importance of self-disclosure in the modern political landscape. By addressing topics with apparent simplicity and honesty, they manage to create a sense of identification with their audience, allowing them to exert influence over users' perceptions and attitudes (Klüver, 2024).

### **Spectacle 2.0**

Political campaigns often employ manipulation tactics that exploit citizens' emotional reactions, particularly fear-inducing and polarizing tactics, which fall under the concept of Spectacle 2.0. The term alludes to the strategic orchestration of dramatic and emotional events to capture public attention and shape public perception. By dramatizing ideological extremes, political actors can intensify social polarization, fostering an "us versus them" mentality that strengthens group loyalty while discrediting rivals.

Political communication has two main manipulation strategies: positive self-disclosure and negative representation of others (Abrahamyan, 2020). Positive self-disclosure builds an idealized image of a candidate or political organization, emphasizing virtues such as competence, integrity, and alignment with public interest. The negative portrayal of others attempts to discredit the opposition by highlighting their perceived mistakes, contradictions, or wrongdoings. Frequently used in speeches, debates, and reports, these two strategies are combined to influence the public and delegitimize the opposition's discourse.

Fear appeals, typically targeting security threats, economic instability, or cultural threats, amplify anxiety and drive the public to seek a protective leader who always has answers. Meanwhile, political leaders who can manage the media spectacle can use their public image to dictate attention and shape opinions, occasionally overshadowing substantive political discussions. This adds complexity to political message reception, as emotional appeal takes precedence over rational considerations (Rice et al., 2024).

### **The election spectacle and social networks**

The concept of "spectacle" is deeply embedded in contemporary society, originating from the work of French Marxist Guy Debord. In his 1967 work "The Society of the Spectacle", Debord characterized postwar consumer capitalism as a system in which social relationships mediated through advertising and mass media imagery. While

the term is often broadly used to describe visually engaging entertainment, Debord precisely defined the spectacle as an ideological mechanism that shapes public perception through media representation. In this sense, the spectacle can be defined as a "public exhibition," a large-scale event remarkable for its impressive appearance. It includes a wide range of visually oriented cultural forms, where the most important aspect is that a spectacle is watched, and spectacular events attract the most audience. The form and political function of the spectacle vary depending on the political regime. For example, in a democratic societies, grandiose displays of power and supremacy made less sense and attracted little to no interest. Over time, the spectacle has transitioned from ancient poetic performances to the mass-mediated, algorithm-driven spectacles of modern society.

An important question raised at one point was "whether new online communication channels would undermine the idea of a passive public, as it was during the television era, by providing people with platforms where they could react or even create their own spectacles". In today's hyper-mediated technology society, an important question posed by poststructuralist Jean Baudrillard arises: is there a reality that can be distinguished from its spectacular constructions? Baudrillard argues that contemporary society experiences "hyper-reality," where media representations are not mere reflections of reality but become more convincing and influential than reality itself. Social networks amplify this effect by creating an ecosystem in which political figures are consumed as curated digital personas rather than as authentic individuals. This distortion shapes public understanding of political and social events, reinforcing an environment where spectacle supersedes substantive debate (Penner, 2015).

In the digital age, the "political spectacle" on social networks operates through two interrelated dynamics: politicians connect directly with citizens but are also forced to conform to the dynamics of the online environment, adapting real information, blending it with entertainment or emotional impact, or at least shaping it to present political topics in an appealing manner. The main goal is to capture attention and make information accessible, emphasizing this "spectacle" rather than deep political debate (Husain, 2023). Social networks sites created a perfect environment for this dynamic, serving as fertile ground for political parties or independent candidates to develop communication strategies aimed at strongly impacting users (Romadanova, 2023).

The adaptation of political spectacle on social networks introduces critical challenges related to media content regulation and transparency in electoral campaigns. Digital platforms have become a primary tool in electoral communication strategies, used by candidates to increase visibility and create a direct connection with citizens. The 2024 presidential election campaign exemplified the shift, with TikTok emerging as a key platform for political messaging. However, insufficient oversight of political advertising on TikTok raised concerns about the transparency and fairness of the electoral process.

From a regulatory perspective, TikTok's platform policy explicitly prohibits the promotion of political content and election campaigns, including ads from political candidates, parties, action committees, and individuals supporting or opposing government policies, elections, voting initiatives, or referenda. However, there are limited exceptions for government organizations, which can conduct election campaigns, but these ads require prior approval, and the distributed media content must be marked accordingly (TikTok Advertising Policies, 2025). In Romania, the obligation to label electoral transparency is legally mandated by national and European legislation. According to Law No. 334/2006 on the financing of political parties and electoral campaigns, parties and candidates are obligated to ensure financial transparency and

## Communication psychopathologies in the presidential election campaign in Romania

compliance with electoral regulations. Due to the unfair electoral process, legal regulations were introduced. Regulation (EU) 2024/900 of the European Parliament and Council, issued on March 13, 2024, introduced stricter transparency measures, obligating political candidates to disclose promotional content details, including its distribution, funding, and editing. These include the obligation for political candidates to publish, along with each political advertisement, detailed information about its promotion, distribution, posting, or editing.

During Romania's 2024 electoral campaign, an Expert Forum (EFOR) report (Policy Brief No. 190) highlighted significant concerns regarding the manipulation of online political discourse. An independent candidate witnessed a rapid increase in electoral preference, rising from 2% to 22%. This rise was mainly attributed to the electoral campaign conducted on TikTok, where innovative manipulation strategies were used, such as the coordinated management of multiple fake accounts (bots) to artificially amplify content reach. Additionally, this independent candidate's posts were distributed without any labeling to indicate electoral campaign promotion. Dedicated hashtags, such as **#equilibriumandverticality**, were used in promotion, attracting millions of views and significantly impacting the candidate's visibility.

The election results raised serious concerns about the integrity of democratic processes in the face of digital manipulation. The Expert Forum report highlights the European legislative framework, particularly Regulation (EU) 2022/2065 on digital services (Digital Services Act – DSA), which imposes strict obligations on digital platforms to ensure algorithmic transparency, mitigate disinformation risks and enforce political content regulations. According to Article 34 of the DSA, Very Large Online Platforms (VLOPs) must identify, analyze, and assess the systemic risks generated by how their services are designed, operated, and used. These risks include influencing the democratic process, spreading disinformation and unlabeled content, and manipulating public opinion through opaque algorithms.

Article 26 of the DSA stipulates that social platforms must ensure the identification of sponsors and sources of political content. Despite these legal regulations in place, TikTok indirectly allowed the promotion of media content and political messages through influencers and coordinated accounts without proper labeling, which contradicts legal requirements. Algorithmic transparency is also regulated in Article 27 of the DSA, which states that social platforms must provide clear information about the parameters determining the display of certain types of media content. The report emphasizes that TikTok's algorithms, which prioritize emotional content, are not sufficiently transparent, and users and authorities lack access to information about how recommendations are generated. This lack of transparency contributes to systemic risks, distorts public political debates, and influences the electoral process. The impact on the first round of Romania's presidential elections was visible, being associated with creating an advantage for a single candidate, manipulating public opinion, and exploiting users. These events led to the need for an official European investigation into TikTok's compliance with DSA provisions. Proposed measures include publishing a detailed risk assessment of the platform's impact on democracy in Romania, imposing corrective measures and sanctions for ongoing regulation violations, and creating a transparent report on algorithm functionality and electoral media content management.

In conclusion, contemporary electoral campaigns are increasingly shaped by digital strategies that blur the boundaries between political communication and mass entertainment. The intersection of technological advancements and manipulative tactics

underscores the urgent need for critical media literacy and regulatory intervention. Ensuring electoral transparency in the digital era requires a balanced approach that fosters political engagement while mitigating the risks of misinformation, algorithmic bias, and hyper-reality in political discourse.

#### Authors' Contributions:

The authors contributed equally to this work.

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## Article Info

*Received:* March 25 2025

*Accepted:* May 10 2025

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## Communication psychopathologies in the presidential election campaign in Romania

**How to cite this article:**

Seceleanu, A., Garabet, B. I. (2025). Communication psychopathologies in the presidential election campaign in Romania. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 18 – 29.



## ORIGINAL PAPER

# Green Capital for a Sustainable Future: Trends and Perspectives

Andrei Cristian Spulbar<sup>1)</sup>

### Abstract:

The transition to sustainable finance is reshaping global markets, with green capital playing a vital role in funding environmentally friendly projects. This study explores the expansion of green bond issuance across European nations between 2014 and 2023, analyzing trends, key contributors, and sectoral distributions. By leveraging a comprehensive dataset, the research highlights the steady growth in green finance, revealing how both corporate and governmental entities have embraced sustainable investment mechanisms.

Visual representations of green bond issuance illustrate annual fluctuations, country-specific market dominance, and the comparative involvement of public and private sectors. Despite the positive trajectory, challenges such as greenwashing, inconsistent reporting frameworks, and economic volatility persist. The paper also examines regulatory enhancements, technological innovations, and public-private collaborations expected to drive future growth in sustainable finance.

With increasing emphasis on Environmental, Social, and Governance (ESG) criteria, financial institutions must navigate emerging regulations while ensuring meaningful environmental impact. As sustainable finance becomes more standardized, its role in mitigating climate change and fostering long-term economic resilience strengthens. This study underscores the transformative potential of green capital and its ability to redefine the financial ecosystem toward a more sustainable future. By addressing current obstacles and leveraging strategic opportunities, the path to a resilient and green financial market appears promising.

**Keywords:** *Green Finance, FinTech, Climate Change, Sustainable Development, ESG.*

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## **Green Capital for a Sustainable Future: Trends and Perspectives**

### **Introduction**

The financial sector is undergoing a significant transformation as sustainability becomes a priority for investors, businesses, and governments. Green capital, which encompasses investments aimed at supporting environmentally friendly projects and initiatives, is playing a crucial role in shaping the future of finance.

Sustainable finance has gained momentum over the past two decades, particularly as climate change and environmental degradation have become pressing global concerns (UNEP, 2019). Research indicates that integrating sustainability into financial decision-making not only mitigates environmental risks but also enhances long-term economic stability (Clark, Feiner & Viehs, 2015). The rise of green investments is driven by multiple factors, including government policies, investor preferences, and the need to meet international climate commitments such as the Paris Agreement (OECD, 2020).

According to the European Investment Bank (EIB, 2021), green finance instruments such as green bonds have emerged as a pivotal mechanism to channel investments towards sustainable projects. Green bonds are specifically designed to finance projects that have positive environmental impacts, such as renewable energy development, energy efficiency improvements, and sustainable infrastructure (World Bank, 2018). Over the years, their issuance has grown substantially, with Europe leading the global market in green bond financing (Climate Bonds Initiative, 2022).

The role of regulatory frameworks in fostering green finance cannot be overstated. The European Union, for example, has implemented the Sustainable Finance Disclosure Regulation (SFDR) and the EU Taxonomy for sustainable activities, which provide clear guidelines on what constitutes environmentally sustainable investments (European Commission, 2021). These measures aim to prevent greenwashing, ensuring that capital flows towards genuinely sustainable projects rather than being misallocated to misleadingly labeled investments (Amel-Zadeh & Serafeim, 2018).

In addition to regulatory support, shifts in investor behavior have also played a significant role in the expansion of green finance. Institutional investors such as pension funds and asset managers are increasingly incorporating Environmental, Social, and Governance (ESG) criteria into their investment strategies (Eccles & Klimenko, 2019). Studies suggest that companies with strong ESG performance tend to exhibit lower volatility and higher resilience in times of economic downturn (Friede, Busch & Bassen, 2015). This has led to a growing demand for green financial instruments that align with sustainable development goals while offering competitive financial returns.

Despite the optimism surrounding green capital, challenges remain. One of the most prominent issues is the lack of standardization in defining and measuring the impact of sustainable investments (Baker et al., 2018). While the EU has made strides in addressing this issue through the EU Taxonomy, other regions still face inconsistencies in sustainability reporting and impact assessment. Furthermore, concerns about the profitability of green investments persist, with some critics arguing that sustainable projects may offer lower financial returns compared to conventional investments (Gianfrate & Peri, 2019). However, recent analyses indicate that green bonds and other sustainable finance instruments can perform on par with, if not better than, traditional investments in terms of risk-adjusted returns (Nanayakkara & Colombage, 2019).

## Methodology

This study employs a mixed-methods quantitative approach to examine green bond issuance trends across European countries between 2014 and 2023. The analysis draws on publicly available datasets from authoritative international sources, selected for their reliability, scope, and alignment with the study's research objectives.

The primary data on green bond issuance by country and issuer type were extracted from two key platforms:

### 1. *IMF Climate Change Indicators Dashboard*

The cross-country dataset on green bond issuances was obtained from the International Monetary Fund (IMF) Climate Data Hub, which consolidates data from Refinitiv, the Climate Bonds Initiative (CBI), and national sources. The dataset provides annual figures on total and sovereign green bond issuance, expressed in billions of USD, covering over 80 economies. For the purpose of this study, the sample was restricted to European Union member states and select European Economic Area (EEA) countries.

### 2. *European Environment Agency (EEA) Green Finance Indicators*

Complementary data were obtained from the EEA Datahub. This source provides disaggregated information on the relative share of green bond issuance attributable to corporate (CRP), government (GOV), and total issuers (TOTAL), expressed as a percentage of total bond issuance. The data are compiled by Eurostat and align with the EU Sustainable Development Goals (SDG) indicator framework.

The raw data from both sources were pre-processed using Python and Microsoft Excel. Data cleaning involved:

- Filtering by country and year (2014–2023)
- Harmonizing issuer types (corporates, governments, and total)
- Removing missing or non-relevant observations (e.g., countries with incomplete time series)
- Aggregating figures to allow comparative analysis by year, sector, and geography

Percentage-based data from the EEA dataset were combined with absolute issuance volumes from the IMF dataset to enable both relative and absolute comparisons.

Descriptive statistical methods were employed to identify temporal trends, sectoral distribution, and geographic disparities in green bond issuance.

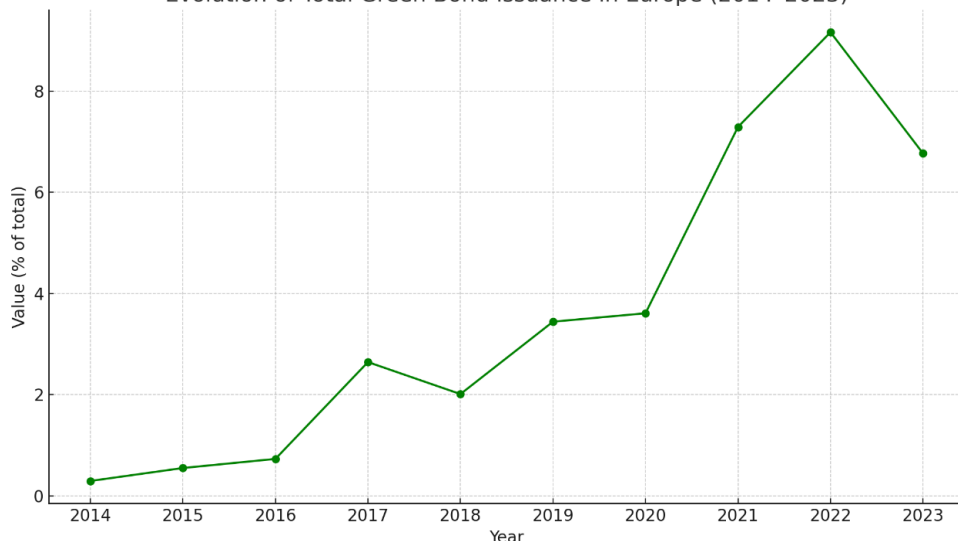
## Limitations

While the datasets provide comprehensive coverage of green bond activity, some limitations must be acknowledged. Differences in classification methodologies, reporting standards, and currency conversions across countries may introduce inconsistencies. Lastly, the study focuses on issuance volumes rather than the environmental effectiveness or impact of funded projects, which warrants further qualitative research.

## Evolution of green bond issuances (2014-2023)

The evolution of green bond issuance in Europe between 2014 and 2023 reveals a compelling narrative of sustained growth and increasing investor confidence in sustainable finance instruments. Drawing on aggregated data across all issuer types, the first phase of the analysis highlights a clear upward trajectory in the adoption of green bonds as a viable mechanism for financing environmentally friendly projects.

Figure 1. Evolution of Total Green Bond Issuance in Europe (2014-2023)  
Evolution of Total Green Bond Issuance in Europe (2014-2023)

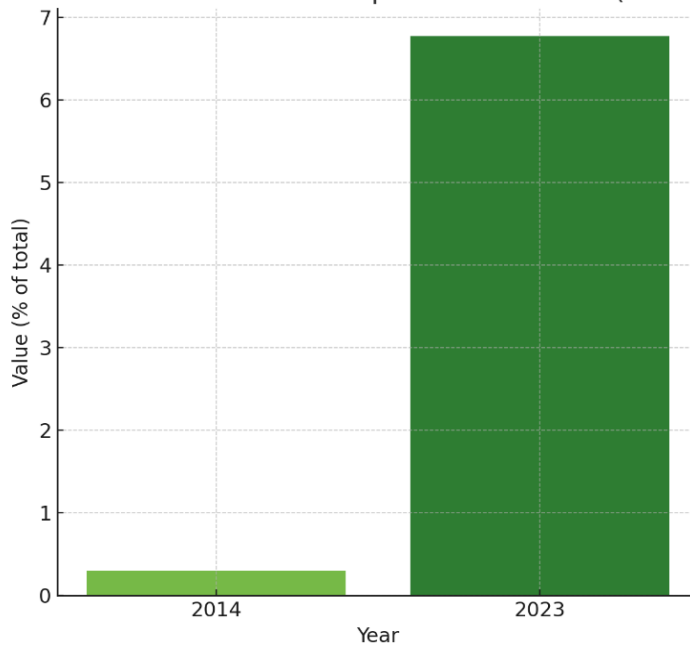


Source: Author's own processing of IMF and EEA data

The overall trend, illustrated by the line chart tracking annual issuance levels, reflects a remarkable increase over the decade. From a modest start in 2014, green bond issuance steadily accelerated, particularly after 2016. This inflection point coincides with the global momentum generated by the 2015 Paris Agreement, which significantly influenced policy directions and market behavior across European nations. The period between 2020 and 2022 stands out for its sharp surge in issuance volumes. This can be attributed to several converging factors, including the European Green Deal, which was launched in 2019, and the EU's post-COVID economic recovery framework, which emphasized green and digital transitions. Instruments such as the "NextGenerationEU" fund further catalyzed investments in climate-resilient infrastructure, clean energy, and sustainable transport.

However, the data also reveal a subtle yet notable contraction in 2023, marking the first dip following years of continuous growth. This downturn may signal a temporary disruption linked to broader macroeconomic conditions, such as inflationary pressures, rising interest rates, or geopolitical uncertainties related to the war in Ukraine. Another plausible explanation lies in the tightening of regulatory standards through mechanisms such as the EU Taxonomy for sustainable activities. As the definitions and reporting requirements surrounding green finance become more stringent, some projects previously classified as "green" may no longer qualify under the new criteria. This could lead to a more selective issuance environment, prioritizing quality and impact over volume.

Figure 2. Green Bond Issuance in Europe: 2014 vs 2023  
Green Bond Issuance in Europe: 2014 vs 2023 (All Issuers)



Source: Author's own processing of IMF and EEA data

To contextualize this growth, a direct comparison between the starting and ending points of the decade—2014 and 2023—offers a striking perspective. In 2014, green bonds accounted for just under 0.3% of the total bond market in Europe. By 2023, their share had expanded to nearly 7%, representing a more than twenty-fold increase. This explosive growth underscores a profound shift in the financial sector: what began as a niche, mission-driven investment product has matured into a mainstream financial instrument. This transformation is not only quantitative but also qualitative, as green bonds are increasingly recognized for their dual role in delivering competitive financial returns and supporting environmental goals.

Yet, despite this progress, green bonds still represent a relatively small fraction of the total bond market. The implication is twofold. On the one hand, the current trajectory signals immense potential for further scaling, especially as more investors adopt Environmental, Social, and Governance (ESG) criteria as part of their decision-making frameworks. On the other hand, the modest share of green bonds in overall bond issuance calls attention to the need for continued regulatory support, market innovation, and public-private partnerships to broaden the reach and depth of sustainable finance.

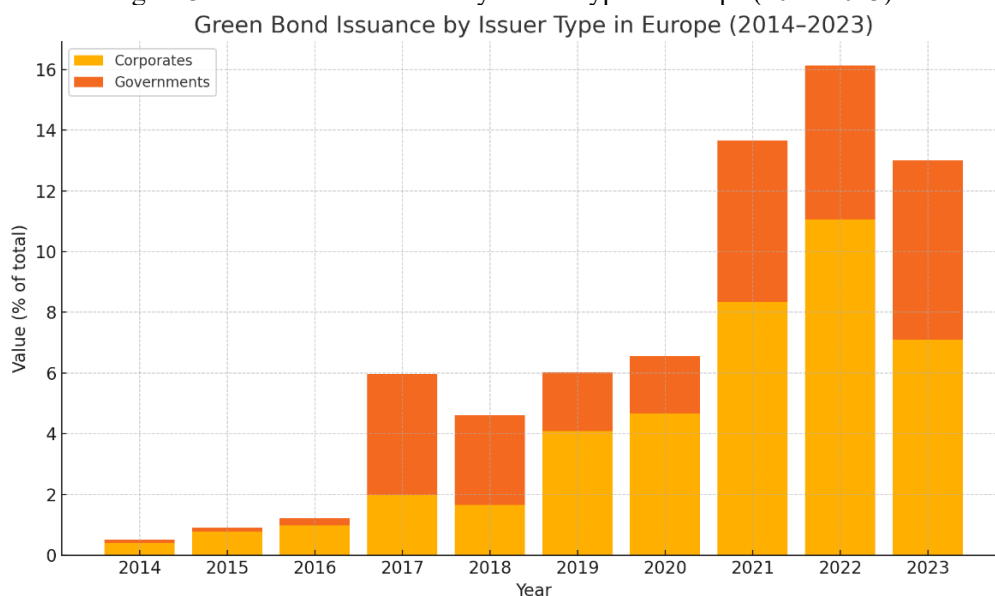
The findings presented above demonstrate that green capital is no longer an experimental or marginal tool. Instead, it is gradually becoming embedded within the architecture of European financial markets. While challenges such as economic volatility and evolving definitions of sustainability persist, the fundamental direction is clear: green finance is here to stay, and its influence on capital allocation, risk management, and climate strategy will only deepen over time.

## Green Capital for a Sustainable Future: Trends and Perspectives

### Distribution by emitter category

A deeper look into the issuer composition of green bond markets between 2014 and 2023 reveals notable differences in the behavior and impact of corporate and governmental actors. Two visualizations—the stacked bar chart and the comparative line chart—highlight these dynamics and offer insights into how each sector has shaped the trajectory of green finance in Europe.

Figure 3. Green Bond Issuance by Issure Type in Europe (2014-2023)

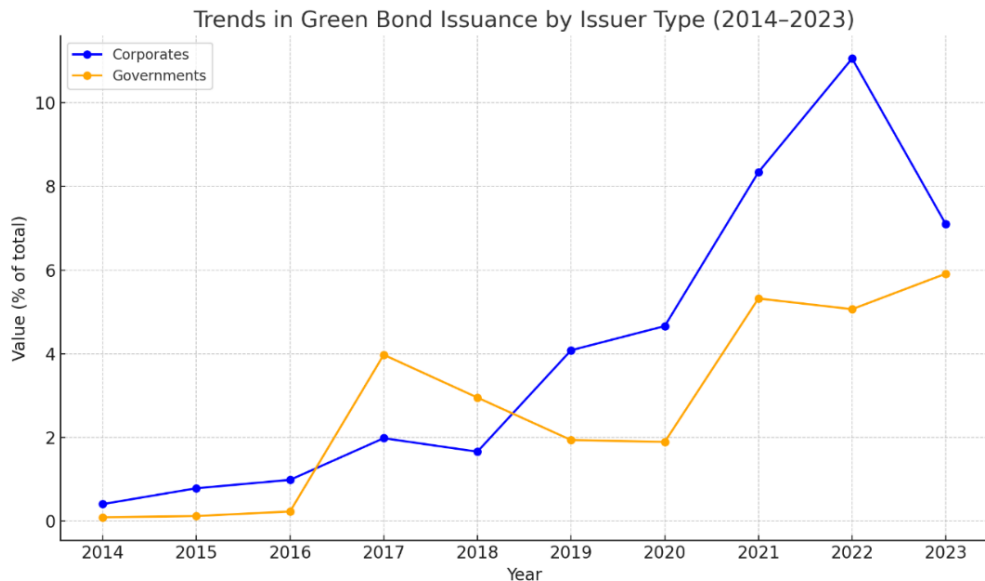


Source: Author's own processing of IMF and EEA data

The stacked bar chart illustrates the combined annual contributions of corporates and governments to total green bond issuance. It is immediately evident that corporate issuers have played a dominant role throughout the observed period, accounting for the majority share in almost every year. From the outset in 2014, corporations were quick to adopt green bonds as a means of financing clean energy, energy efficiency, and sustainable development projects. Their share has not only remained substantial but has also shown strong year-over-year growth, peaking in 2022.

Governments, by contrast, have maintained a smaller, though increasingly important, presence in the green bond ecosystem. Their issuance grew steadily over the period but remained below that of corporates until 2023, when the public sector's share approached parity with corporate issuance. This shift may reflect the rise of sovereign green bonds issued by national governments to fund climate-resilient infrastructure, public transportation, and clean technology. Initiatives such as Germany's twin bond strategy and the EU's issuance of green bonds under the "NextGenerationEU" umbrella have expanded the role of governments as proactive climate financiers.

Figure 4. Trends in Green Bond Issuance by Issuer Type (2014-2023)



Source: Author's own processing of IMF and EEA data

The comparative line chart further emphasizes the divergent, yet complementary, growth paths of these two issuer types. Corporates demonstrate a smoother and more consistent upward trajectory, suggesting a steady internalization of sustainability goals within private sector investment frameworks. The public sector's path, while more volatile, suggests strategic, large-scale interventions tied to specific policy frameworks or fiscal cycles. For instance, the significant growth in government issuance between 2016 and 2019 could be linked to broader EU commitments on climate finance under the Paris Agreement and the emergence of national green bond frameworks.

These findings point to an increasing alignment between public and private sector priorities in the realm of sustainable finance. Initially driven by corporations, likely due to market pressures and brand positioning, the green bond landscape is now benefiting from strong governmental participation. This dual-track expansion enhances the credibility and scalability of green finance, as both regulatory backing and market innovation converge.

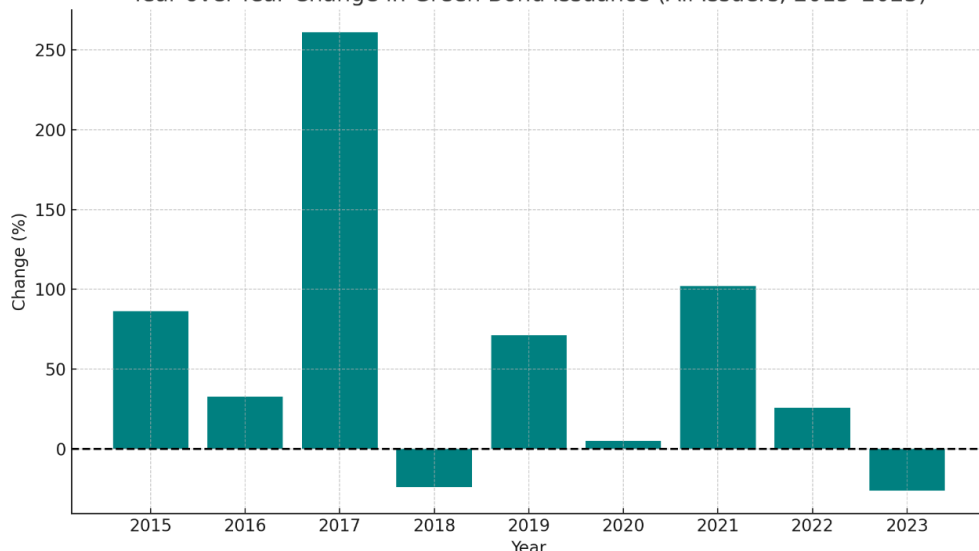
It is also important to note the implications of this shift for policy and market development. Governmental involvement not only boosts issuance volumes but also helps establish benchmarks for transparency, reporting, and environmental impact measurement. Meanwhile, corporate issuers contribute agility, innovation, and scalability to the market. Together, these forces are creating a more robust and resilient green finance architecture—one that can support the European Union's climate neutrality goals while offering investors diversified, impact-oriented opportunities.

### Trends and fluctuations

While the overall trajectory of green bond issuance in Europe between 2014 and 2023 is one of expansion, a closer examination of year-over-year fluctuations reveals a more nuanced picture. These short-term variations offer important insights into the factors that influence market behavior and the evolving maturity of sustainable finance.

## Green Capital for a Sustainable Future: Trends and Perspectives

Figure 5. Year-over-Year Change in Green Bond Issuance (2015-2023)  
Year-over-Year Change in Green Bond Issuance (All Issuers, 2015-2023)



Source: Author's own processing of IMF and EEA data

The bar chart illustrating annual percentage changes in issuance volumes reveals strong positive growth across most of the observed period, particularly between 2015 and 2018. During these years, the market experienced double-digit to even triple-digit growth rates, reflecting a low base effect and a surge in institutional and governmental interest in sustainable investment channels. The rapid uptake was likely bolstered by a confluence of supportive factors: enhanced climate commitments post-Paris Agreement, increased investor awareness of ESG risks, and the growing availability of standardized green finance instruments.

Between 2019 and 2021, the pace of growth moderated, though it remained positive. This period marks a transition from rapid expansion to consolidation, as green bonds moved from novelty to normalization within the broader financial ecosystem. Importantly, this phase coincides with structural changes in the regulatory environment, such as the development of the EU Taxonomy and the introduction of the Sustainable Finance Disclosure Regulation (SFDR). These frameworks began to exert a disciplining influence on the market, encouraging greater transparency while potentially limiting the issuance of less rigorously defined “green” instruments.

A dramatic increase in 2022 marked a high point for the decade, aligning with the disbursement of green recovery funds and elevated climate policy momentum across the EU. However, this surge was followed by a sharp decline in 2023, signaling the first annual contraction in green bond issuance in nearly a decade. This reversal may have been triggered by a combination of economic and regulatory headwinds. Persistently high inflation, increased borrowing costs, and geopolitical instability—particularly in the wake of the war in Ukraine—have all contributed to a more cautious investment climate. Simultaneously, the tightening of eligibility criteria for green projects under EU regulations may have reduced the volume of qualifying issuances, even as demand remained robust.

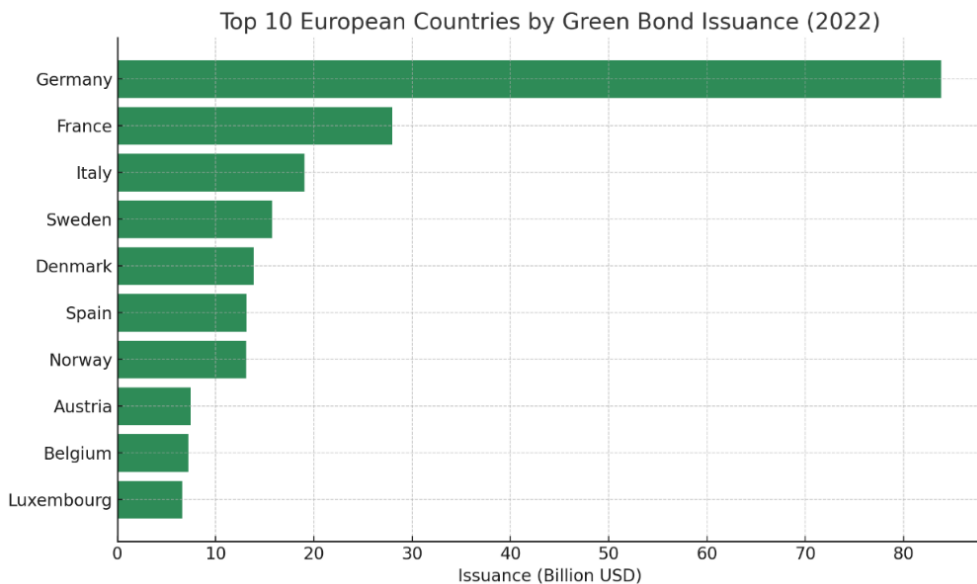
These fluctuations suggest that while green finance is increasingly resilient, it is not immune to broader macroeconomic or policy shocks. However, the market's ability to rebound after previous dips indicates an underlying structural strength and long-term investor commitment. The continued presence of public and private issuers, even amid volatility, further reinforces the role of green bonds as a strategic tool in aligning financial markets with climate objectives.

In sum, the green bond market has entered a more mature phase, where growth is no longer purely exponential but increasingly shaped by quality, regulatory alignment, and macro-financial context. These dynamics signal a healthy evolution toward a more credible, impactful, and sustainable green finance ecosystem.

### Country-Level Analysis

Understanding the geographic distribution of green bond issuance offers critical insights into how individual countries within Europe are mobilizing financial resources to address environmental challenges. The analysis of 2022 data reveals a highly uneven landscape, with a few dominant players driving a significant share of the market.

Figure 6. Top 10 European Countries by Green Bond Issuance (2022)



Source: Author's own processing of IMF and EEA data

The bar chart showcasing the top ten European countries by green bond issuance in 2022 highlights France, Germany, and the Netherlands as regional leaders. These countries have consistently demonstrated strong commitments to sustainable finance, underpinned by robust regulatory frameworks, mature capital markets, and ambitious climate agendas. France, in particular, has been a pioneer in sovereign green bond issuance, having launched its first major offering in 2017, which set a precedent for other nations in the EU.

## **Green Capital for a Sustainable Future: Trends and Perspectives**

Germany's position near the top reflects a dual strategy of public and private engagement. Through its "twin bond" structure—where green bonds are issued alongside conventional ones with similar characteristics—the German government has introduced liquidity and transparency to the sovereign green bond market. In parallel, corporate issuers across sectors such as automotive, energy, and real estate have contributed to the steady increase in issuance volumes.

The Netherlands has also emerged as a major hub for green finance, supported by a highly developed financial sector and a long-standing focus on climate adaptation, particularly in areas such as flood management and sustainable infrastructure. Dutch institutional investors have been particularly active in the green bond space, integrating ESG criteria into portfolio strategies and exerting influence on market practices.

Beyond the top three, countries such as Sweden, Spain, and Italy exhibit moderate yet growing levels of green bond issuance. These markets are characterized by increasing private sector engagement and growing policy support for climate-aligned investments. In the case of Sweden, for example, a culture of environmental consciousness, combined with innovation in sustainable technologies, has fostered favorable conditions for green finance.

The geographic disparity observed in 2022 suggests that while the green bond market is expanding across Europe, it remains concentrated in economically advanced countries with established financial infrastructures and proactive climate policies. Emerging economies within the EU, including nations in Central and Eastern Europe, have yet to realize the full potential of green capital. Factors such as limited market liquidity, regulatory uncertainty, and capacity constraints may be impeding progress in these regions.

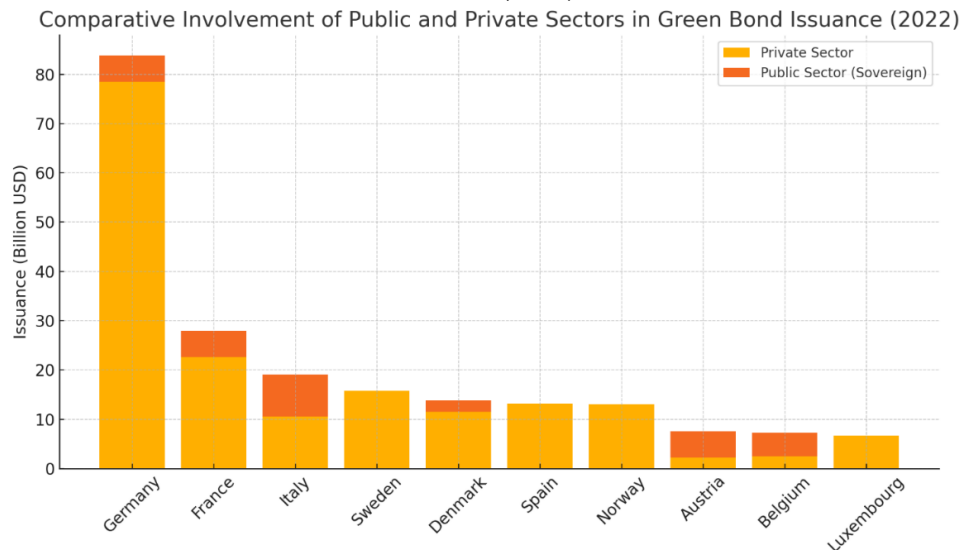
This divergence presents both a challenge and an opportunity. On the one hand, it points to the need for targeted capacity-building efforts, technical assistance, and tailored financial instruments to support green bond development in underrepresented markets. On the other, it highlights the potential for regional convergence if smaller economies are able to leverage EU-wide initiatives, such as the European Green Deal Investment Plan or the InvestEU program, to catalyze green investment at scale.

Ultimately, the country-level analysis underscores that green finance is not only a market phenomenon but also a reflection of national policy ambition and institutional capacity. As European countries continue to align with climate neutrality targets, the geographic footprint of green bond issuance is likely to expand, contributing to a more inclusive and resilient financial transition across the continent.

### **Public vs Private Sector Dynamics at the Country Level**

A closer examination of country-level data reveals critical differences in the balance between public and private sector involvement in green bond issuance across Europe. The stacked bar chart depicting the top ten European countries by total issuance in 2022 offers a valuable comparative view of sovereign (public) versus corporate (private) contributions

Figure 7. Comparative Involvement of Public and Private Sectors in Green Bond Issuance (2022)



Source: Author's own processing of IMF and EEA data

Among the leading issuers, France and Germany again stand out not only for the scale of their green finance activity but also for the diversity of their issuance base. France demonstrates a relatively balanced structure, with strong sovereign issuance complementing a dynamic private sector. This dual engagement reflects both a proactive government climate policy and a mature financial sector capable of integrating ESG principles into mainstream investment strategies.

Germany, in contrast, exhibits a stronger emphasis on private sector participation, with corporate issuers playing a dominant role. This trend aligns with the country's decentralized energy model and the significant involvement of industrial players in the green transition. Nevertheless, sovereign issuance has gained traction in recent years through Germany's twin bond program, offering investors a credible and liquid green benchmark.

The Netherlands also exhibits a market largely driven by the private sector. Its financial institutions, utility companies, and real estate firms have actively issued green bonds, supported by a progressive regulatory environment and strong investor demand. While sovereign issuance exists, its relative share remains modest, suggesting that the state plays more of a facilitative than a leading role in green finance.

Conversely, countries like Italy and Spain show a higher relative contribution from the public sector. In these cases, sovereign green bonds have emerged as a significant source of climate finance, likely driven by large-scale national investment programs and efforts to align public borrowing with EU-wide sustainability objectives. These governments are increasingly using green bonds as tools for strategic funding of energy transition, transportation infrastructure, and climate resilience projects.

Interestingly, some countries such as Sweden and Belgium reflect a near-exclusive reliance on private sector issuance, highlighting the strength of corporate ESG integration and possibly a more limited role of the central government in direct green bond financing. This pattern may also indicate strong subnational or municipal participation in

## Green Capital for a Sustainable Future: Trends and Perspectives

the green bond market, which can be substantial yet not always captured under sovereign categories.

These comparative profiles underscore a broader insight: the architecture of green finance varies significantly by country, shaped by political will, institutional capacity, market development, and investor engagement. In some contexts, governments act as primary mobilizers of capital through sovereign issuance, while in others, private entities—motivated by innovation, regulatory incentives, or reputational value—take the lead.

The co-existence of public and private issuers strengthens the overall resilience and legitimacy of the green bond market. Public sector involvement signals political commitment and sets standards for impact and transparency. Private sector engagement ensures innovation, scalability, and integration of sustainability into core business models. The interplay between these two spheres will continue to define the pace and effectiveness of Europe's financial transition toward sustainability.

### Policy Recommendations

The empirical and comparative analysis presented in this study underscores both the progress and the persisting challenges within the European green bond market. While the growth trajectory is promising, achieving a sustainable, transparent, and inclusive financial system requires targeted interventions. The following policy recommendations aim to strengthen the foundations of green finance, enhance credibility, and promote equitable access across sectors and regions.

#### 1. *Standardization and Harmonization of Green Definitions*

To address the persistent risk of greenwashing and ensure capital is effectively aligned with climate objectives, there is a continued need for greater standardization of green bond definitions and impact measurement frameworks. While the EU Taxonomy provides a robust foundation, its full integration across national regulatory systems and market practices remains incomplete. Expanding the taxonomy to cover a broader range of sectors and activities, and aligning it with emerging global standards (e.g., ISSB frameworks), will foster consistency and comparability.

#### 2. *Strengthening Impact Reporting and Verification*

Beyond initial certification, rigorous post-issuance reporting and third-party verification are essential to maintaining market integrity. Policymakers should mandate standardized reporting templates for green bond proceeds and environmental outcomes, drawing on best practices from initiatives such as the Climate Bonds Standard. Public institutions can also support the development of centralized, open-access platforms for monitoring environmental impacts, improving transparency and investor confidence.

#### 3. *Enhancing Public Sector Participation and De-risking Instruments*

The analysis indicates that sovereign and public issuers play a pivotal role in shaping national green finance ecosystems. Governments should continue to issue sovereign green bonds to set benchmarks, while also leveraging blended finance tools to de-risk investments in less mature markets. Institutions like the European Investment Bank (EIB) and national development banks should expand their role in providing guarantees, subordinated capital, and technical assistance to crowd in private investment.

#### 4. *Supporting Green Bond Market Development in Emerging EU Economies*

The uneven geographic distribution of green bond issuance across the EU highlights the need for capacity-building programs and targeted incentives in Central and Eastern Europe. EU-level mechanisms—such as the InvestEU platform and Just

Transition Fund—should prioritize technical assistance, regulatory support, and co-financing models in countries with limited domestic issuance, thereby fostering convergence in green finance participation across member states.

*5. Encouraging ESG Integration Across All Asset Classes*

While green bonds are a key instrument, the broader transition to sustainable finance requires mainstreaming ESG principles across equity, debt, and alternative investments. Regulators should consider incentives or soft mandates for institutional investors to integrate ESG considerations into their portfolio strategies. Additionally, the adoption of forward-looking, climate-aligned financial risk assessments (e.g., stress testing based on net-zero scenarios) can help institutions internalize long-term sustainability risks.

*6. Promoting Innovation and Digital Infrastructure for Green Finance*

To improve efficiency and reduce transaction costs, public support should be directed toward developing digital infrastructure for green finance, including platforms for green bond issuance, AI-based ESG analytics, and blockchain-enabled traceability tools. Pilot programs, regulatory sandboxes, and EU-backed innovation labs can accelerate the deployment of such technologies, particularly in sectors where impact measurement remains complex or fragmented.

**Conclusions**

This study has examined the evolution, composition, and geographic distribution of green bond issuance across Europe between 2014 and 2023, offering a comprehensive assessment of trends, sectoral dynamics, and policy context. The findings underscore a decade of rapid growth and increasing sophistication in green finance, driven by both market forces and regulatory intervention. Total issuance volumes have expanded more than twenty-fold since 2014, reflecting not only investor demand but also the institutionalization of sustainability as a guiding principle in financial decision-making.

The comparative analysis of issuer types reveals that the private sector has consistently led green bond issuance, particularly in mature markets such as Germany and the Netherlands. However, the growing involvement of sovereign issuers demonstrates a strategic shift in public finance, positioning governments as both market participants and norm-setters. The interplay between public and private actors has proven instrumental in building market credibility and expanding the diversity of green financial instruments.

Country-level data further highlight the geographic concentration of green capital flows, with Western and Northern European countries accounting for the majority of issuances. This uneven distribution points to structural gaps in market maturity, institutional capacity, and regulatory support across the European Union. Targeted interventions will be required to promote broader participation and ensure that the transition to sustainable finance is inclusive.

Despite the overall positive trajectory, the temporary contraction observed in 2023 illustrates that the market is not immune to macroeconomic pressures, regulatory shifts, and investor sentiment. As green finance enters a more mature phase, its resilience will depend on the continued development of robust standards, impact-oriented reporting, and mechanisms to mobilize private investment in underfunded regions and sectors.

Looking forward, the role of green capital will be central not only to mitigating climate change but also to shaping a more equitable, transparent, and forward-looking financial ecosystem. By addressing current limitations and aligning financial incentives with environmental and social outcomes, green finance has the potential to serve as a cornerstone of Europe's sustainable economic future.

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- [www.eea.europa.eu/en/datahub/featured-data/statistical-data/datahubitem-view/fbc1e575-35ec-44f5-b669-3066fd885d93](http://www.eea.europa.eu/en/datahub/featured-data/statistical-data/datahubitem-view/fbc1e575-35ec-44f5-b669-3066fd885d93)
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### Acknowledgement:

This work was supported by a grant from the Romanian Ministry of Research, Innovation and Digitalization, the project with the title „Economics and Policy Options for Climate Change Risk and Global Environmental Governance” (CF 193/28.11.2022, Funding Contract no. 760078/23.05.2023), within Romania's National Recovery and Resilience Plan (PNRR) - Pillar III, Component C9, Investment I8 (PNRR/2022/C9/MCID/I8) - Development of a program to attract highly specialised human resources from abroad in research, development and innovation activities.

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### Article Info

*Received:* March 26 2025

*Accepted:* May 18 2025

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**How to cite this article:**

Spulbar, A. C. (2025). Green Capital for a Sustainable Future: Trends and Perspectives. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 30 – 44.



## ORIGINAL PAPER

# Applied Digital Analysis of UN Legal Content on Humanitarian Assistance, Security and Climate Change Policy: Tracking Social Narratives, Public Engagement and Posting Behavior

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### Abstract:

**Background:** Humanitarian assistance, climate change and health emergencies imply the need to identify accurate assistance services and solutions to coordinate responses and to develop more efficient measures and intervention in the international system. In this context, the development of coordinated policies and strategies at the level of the United Nations (UN) must engage an efficient collection of data, resources and information for monitoring public perception developing responsibility, coordinated efforts and resilient responses for the social and humanitarian crisis.

**Aims and objectives:** A first objective of this paper is to explore, analyze and monitor how the ten most relevant topics in the field of humanitarian assistance and climate change are highlighted by the tools made available by the Social Searcher platform as follows: “humanitarian assistance”, “climate change”, “United Nations”. Other relevant topics will be monitored and analyzed in the context of the online analysis conducted at the end of March 2025 for a 24-hour period on March 28, 2025 namely: “social protection”, “health assistance”, “peacefulness”, “humanitarian medical assistance”, “humanitarian crisis”, “UN humanitarian aid”, “social vulnerabilities”, “food assistance”, “UN humanitarian crisis”.

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The second objective of the research is to analyze the variations in the frequency of occurrence of the ten topics through complementary and integrated analysis in the context of the adoption of global initiatives in the field of humanitarian assistance and climate change initiatives.

The media monitoring of the selected topics also has the role of identifying the public's receptivity and unitary approach to a common thematic framework associated with the sphere of humanitarian assistance and public health.

**Materials and methods:** To analyze and monitor the variability and frequency of the selected topics, the study uses the tools of the Social Searcher platform such as: mentions feed and analytics, users, links, trending topics, tracking online sources, engagement context of discussions, tracking topics and presence score, most active topics and profiles. The research implements mixed quantitative and qualitative analysis for data extraction, analysis and interpretation.

**Results and discussions:** The results of the analysis identify two patterns of analysis and interpretation of the results. The first pattern confirms the particular trend of increasing the frequency of the selected topics during the monitoring period. The second pattern labels a common pattern of representation based on the collection of data in various contexts and humanitarian environments, as well as the framework of understanding and responding in the case of humanitarian assistance.

**Conclusions:** The present study provides the practical and applied foundations for monitoring and evaluating an agenda of ten topics in the field of humanitarian assistance, climate change and public health necessary for the contextualized understanding of humanitarian efforts and the needs of the population. The results of the information research intend to contribute to the efficiency of institutional management and governance, by reporting and identifying emerging trends in the context of social and humanitarian assistance in crisis.

**Keywords:** *humanitarian assistance, health, social protection, development, climate change.*

## **Introduction**

Humanitarian assistance, climate change and health emergencies imply the need to identify accurate assistance services and solutions to coordinate responses (Baxter et al., 2022; Schwerdtle et al., 2024; Williams & Downes, 2017) and to develop more efficient measures and intervention in the international system (Cross, 2019; Sankar-Gorton et al., 2024).

In this context, the development of coordinated policies and strategies at the level of the United Nations (UN) must engage an efficient collection of data, resources and information for monitoring public perception developing responsibility, coordinated efforts and resilient responses for the social and humanitarian crisis (Doering-White et al., 2024; McIver et al., 2024).

Therefore, the aims and objectives of the research are aimed at performing and engaging a sentiment analysis by categorizing and classifying mentions of the most relevant topics related to United Nations, humanitarian assistance and climate change as positive, negative or neutral. The second objective engages a double perspective on (a) analyzing and reviewing the posting behavior on weekdays and hour and (b)

understanding the public perception, the tone of the audience, and the intention of online debate.

The importance and relevance of the research stems from the correlation humanitarian assistance, climate change and health emergencies as focused fields in the monitorisation which require more coordinated responses and efficient measures of intervention in the international system. The novelty and ingenuity of data collection and processing aimed at monitoring public perception and the need to develop coordinated efforts and resilient responses for the social and humanitarian crisis make the theme timely and necessary within the international context resuming the coordinated policies and strategies at the level of the United Nations (UN).

### **Literature review**

The research associated to the provision of the UN international humanitarian assistance in different security contexts and the issues associated to climate change have received considerable interest aiming to analyse the scope, legal applicability and results of different endeavors (Shraga, 1998: 64–81). The study of imagology associated to events reporting related to humanitarian issues, security and climate change underscores the role and effects of emergency online media narratives. Discourse analysis highlights the existence and extensive use of frames especially within the digital coverage of humanitarian issues, security and climate change (Wright, Madrid-Morales & Barrie, 2025: 1-31). Further, correlating the discussion about online content reporting and the ethical use of AI technological capacity for responsible generative content in the online media (Olimid, Georgescu & Olimid, 2024a: 120-142; Olimid, Georgescu & Olimid, 2024b: 1-9) draws substantial insight into the possibility to detect and remove algorithmic bias and potentiate reporting control (Cools & de Vreese, 2025: 1-20). Studies have suggested that providing the optimum response in case of humanitarian assistance, climate change and health emergencies stresses the priorities communicated through international politics narratives of security, democracy and human rights (Lerch, 2023: 67-100; Olimid, Georgescu & Gherghe, 2024). Consequently, the analysis of the logic in which providers of humanitarian assistance operate has shown the effect of different narratives in shaping the role of organizations and humanitarian assistance and security architectures at regional level (Spandler, 2020: 172–201; Olimid, Georgescu, Olimid, Georgescu & Gherghe, 2025: 43-56). Also, analysing the role of media humanitarian narratives within the debates determined by the migration crisis, the issue of human rights and sense of justice, as well as the need to provide social and economic protection against eroding vulnerabilities were high of the public agenda (Olsen & Grønning, 2019: 90-106). Further, the analyses of discursive practices and narratives directly associated to climate change emergencies have marked the occurrences of certain shifts in power relations and practices determining a change in perceptions addressing the issue of developing responsibility and resilient attitudes in the stance of humanitarian crisis and environment security concerns (Partzsch, 2024: 77-92). The examination of literature results of the study on climate change narratives has also suggested the existence of different perspectives that are brought forward in different media and shape expectations, policy options, and also local, regional, international initiatives (de León Escobedo, 2023). Consequently, solid analyses of news coverage and online content sentiment analysis render patterns in occurrences, variations in frequency and explore topics in the context of conceptual monitoring (Georgescu, Olimid, Olimid, Georgescu, Gherghe, 2017).

### **Materials and research methodology:**

To analyze and monitor the variability and frequency of the selected topics, the study uses the tools of the Social Searcher platform such as: mentions feed and analytics, users and domains, links, trending topics and hashtags, tracking online sources, engagement context of discussions, tracking topics and presence score, most active topics and profiles. The research implements mixed quantitative and qualitative analysis for data extraction, analysis and interpretation.

Data collection for the three topics on “United Nations”, “humanitarian assistance” and “climate change” was simultaneously engaged, analyzed and monitored being carried out for a period of 24 hours on March 28, 2025 by using and frequenting the data and work and analysis tools made available by the Social Searcher platform (Social Searcher, 2025), more specifically:

(1) digital engagement and Sentiment Assessment on “United Nations”, “humanitarian assistance” and “climate change”;

(2) top domains for digital engagement of the topics “United Nations”, “humanitarian assistance” and “climate change”;

(3) Online distribution and posting behavior by weekdays and time of day

Social Searcher primarily uses a combination of quantitative and qualitative methodology, applied in the context of social media monitoring, namely: (a) quantitative methods for:

(1) measurement and statistical analysis counting mentions, domains and topics’ frequency on social networks;

(2) analysis and evaluations of trends over time during weekdays and hours of the day (complex evolutionary analysis and graphs);

(3) comparative statistical analysis between platforms and online networks, topics, total users, positive mentions, negative mentions or neutral mentions; (b) qualitative methods aimed at understanding the linguistic context and the tone of online posting.

The data were exported for all three topics and all collected data as follows (a) total mentions, total users, sentiment ratio and positive/negative/ neutral mentions aimed to appreciate the tone of posts for each topic selected by evaluating the public perception and engagement (Table 1, Table 3.1. and Table 3.2.);

(b) the domains for compared advanced analysis aimed to appreciate a detailed statistical evaluation of mentions of the topics over time depending on the most active platforms and social networks based on influential users and online sources (Table 2).

In this context, the research limitations engage three major dimensions:

(a) data is collected for a short period of time (data retrieved on March 28, 2025);

(b) the results and findings engage a momentary trend for monitoring the three selected topics;

(c) for extended research accuracy and comparative analysis, it is necessary to successively or constantly collect data for the same topics or comparative topics in the same domain to evaluate a longer period of time.

### **Results and discussions**

The results of the analysis identify two patterns of analysis and interpretation of the results. The first pattern confirms the particular trend of increasing the frequency of the selected topics during the monitoring period. The second pattern labels a common pattern of representation based on the collection of data in various contexts and

humanitarian environments, as well as the framework of understanding and responding in the case of humanitarian assistance.

It should also be noted that the increasing trends for certain topics depending on platforms, online domain and posting behavior have shown variations according to the data rendered and extracted for March 28, 2025 taking into account: In the field of humanitarian assistance, a first key document during the monitoring period is adopted by the United Nations on March 31, 2025, namely the Global Humanitarian Overview 2025 (OCHA, 2025).

The Global Humanitarian Overview (March 31, 2025) focuses directly on the dynamics of global humanitarian needs with the role of engaging a global vision and multidimensional solutions to problems in the sphere of climate-related disasters, local financing, regional response plans, displacement and armed conflicts (OCHA, 2025). In the field of climate change, an important initiative was launched on March 25, 2025 and focuses on the conclusions launched by the Consultative Group of Experts (CGE) on climate action, development, transparency and efficient distribution of resources (UNFCCC, 2025).

The adoption of these key documents by United Nations institutions and bodies can engage and influence in an important and direct way the public agenda and public perception of the objectives of work in the field of humanitarian assistance and climate change. These dimensions, in turn, can shape the way in which the public agenda of institutions is engaged at the level of public discourse, but especially how it is received to a greater or lesser extent on social networks in the following essential aspects:

### **I. Digital engagement and the effect on the public agenda**

With the launch and adoption by the United Nations in early 2025 of a set of measures and initiatives related to high-profile humanitarian and climate frameworks, new directions of debate are launched in the international discourse in the public space engaging urgent global challenges, resilience and climate change, humanitarian assistance or disaster preparedness.

In this context, Table 1 reveals the results of the monitoring of the online space by using the monitoring tools made available by the Social Searcher platform on March 28, 2025. Column 1 measures the category of the monitoring tool (total mentions, total users, sentiment ratio, positive mentions, negative mentions, neutral mentions). The second, third and fourth columns present the results of the analysis for the three monitored topics.

According to the results of the quantitative analysis, the highest number of mentions reflecting frequency and public engagement is recorded in the topic of “United Nations” (495 mentions). For the same topic, the total number of users (283) is also recorded.

**Table 1. Digital engagement and Sentiment Assessment of the topics: “United Nations”, “humanitarian assistance” and “climate change”**

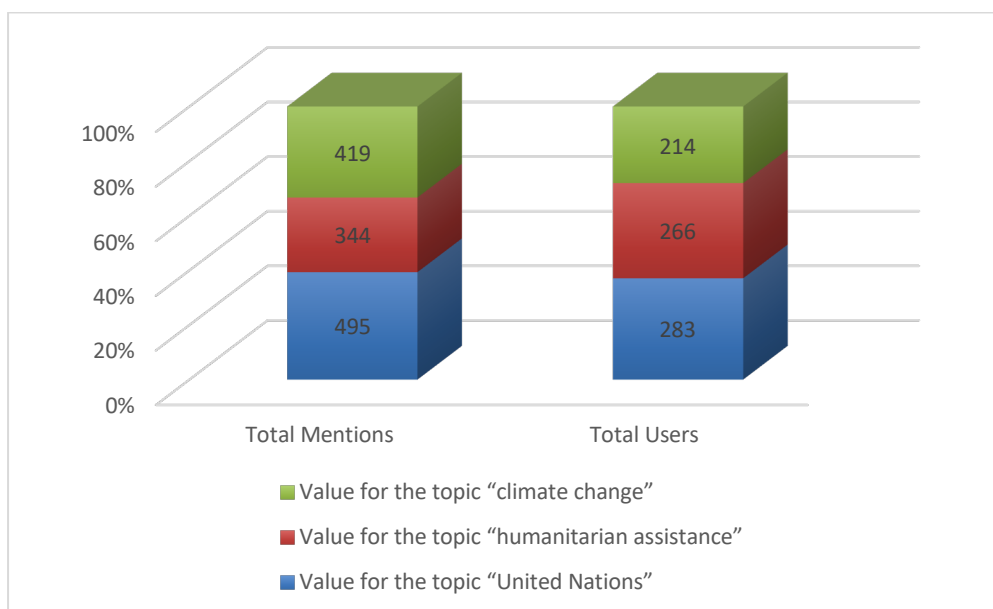
Category	Value for the topic “United Nations”	Value for the topic “humanitarian assistance”	Value for the topic “climate change”
Total Mentions	495	344	419

Total Users	283	266	214
Sentiment Ratio (positive: negative)	4:1	3:2	7:3
Positive Mentions	107 (36% of total)	109 (36% of total)	142 (36% of total)
Negative Mentions	54 (19% of total)	65 (19% of total)	49 (19% of total)
Neutral Mentions	262 (49% of total)	170 (49% of total)	228 (49% of total)

Source: Authors' own compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

At the level of positive/negative/neutral mentions, Table 1, Graph 1 and Graph 2 reflect the positive/negative/neutral emotion transmitted through online posts (likes, posts, replies, reactions, comments, etc.) regarding the three topics selected for analysis and monitoring. Thus, most positive mentions are recorded by the topic “climate change” (142 mentions 36% of the total), and at the level of negative mentions, most mentions are assigned to the topic “humanitarian assistance”. At the level of nonuter mentions, the results are recorded between 262 mentions (for the topic “United Nations”), 170 mentions (“humanitarian assistance”) and 228 mentions (“climate change”).

**Graph 1. Sentiment Metrics and Online Mentions for topics: “United Nations”, “humanitarian assistance” and “climate change”**

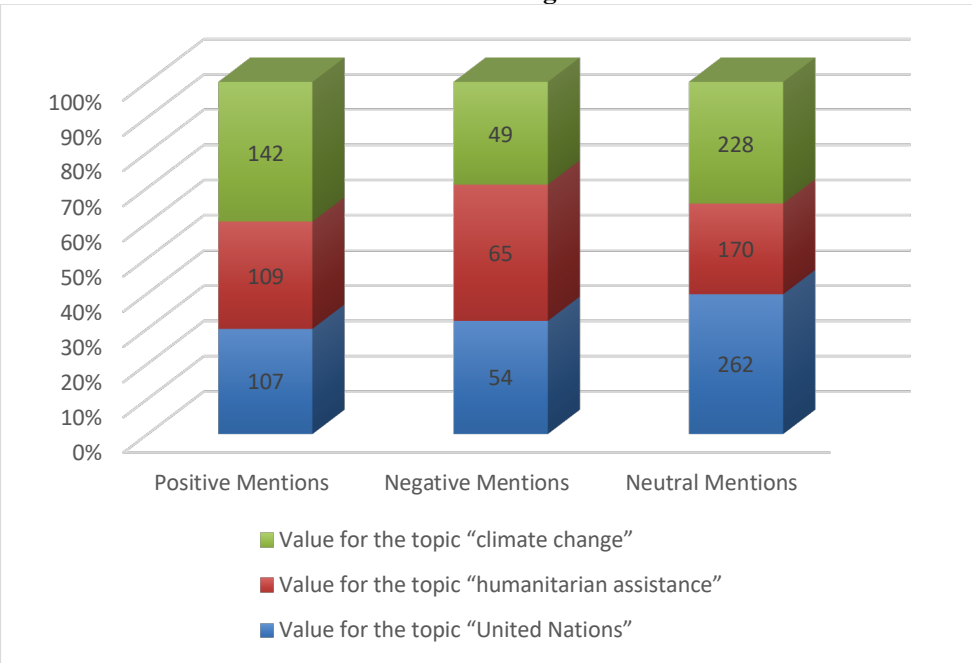


Source: Authors' on compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

The results obtained for the proportion of these categories reflect the proportion of these categories at the level of polarization and public receptivity of the three selected topics. Thus, for the first proportion, 4:1 for the first topic “United Nations” reflects a consolidated and positive general perception, widely exposed and supported in the public space.

On the second topic, a 3:2 ratio for the topic of “humanitarian assistance” engages a generally balanced, favorable public perception, but one that expresses varied beliefs. At the level of the third selected topic, there is a 7:3 ratio for the topic “climate change”, which reflects a generally fundamentally positive perception, but which also implies other critical minority opinions and perceptions.

**Graph 2. Positive, negative and neutral mentions for topics: “United Nations”, “humanitarian assistance” and “climate change”**



Source: Authors’ on compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

**II. Online distribution of domains on social networks**

Table 2 reflects the results of the analysis on the areas where posts, reactions, comments and information regarding the three selected topics were mentioned. Thus, Table 2 identifies the domains used and frequented for online posts retargeting the selected topics, namely social networks, news sites and platforms, information platforms and media, blogs and forums, etc. The most important results are recorded for the following areas: (a) for the topic “United Nations”-flickr.com (100 mentions), dailymotion.com (100) and reddit.com (72); (b) for the topic “humanitarian assistance” - reddit.com (74 mentions), vk.com (59) and youtube.com (51); (c) for the topic “climate change” - flickr.com (100 mentions), dailymotion.com (100), reddit.com (77).

**Table 2. Top domains for digital engagement of the topics “United Nations”, “humanitarian assistance” and “climate change”**

<b>Number</b>	Domain and total mentions for topic “United Nations”	Domain and total mentions for topic “humanitarian assistance”	Domain and total mentions for topic the topic “climate change”
<b>1.</b>	flickr.com (100)	reddit.com (74)	flickr.com (100)
<b>2.</b>	dailymotion.com (100)	vk.com (59)	dailymotion.com (100)
<b>3.</b>	reddit.com (72)	youtube.com (51)	reddit.com (77)
<b>4.</b>	vk.com (28)	i.redd.it (15)	vk.com (19)
<b>5.</b>	i.redd.it (21)	malaymail.com (3)	i.redd.it (9)
<b>6.</b>	denmark.news-pravda.com (6)	france.news-pravda.com (3)	m.vk.com (8)

Source: Authors’ on compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

The results presented in Table 2 also identify the role of online sources and domains of influence, reception and dissemination of information related to the topics selected for analysis. In addition, the first six areas exposed as results for each topic also have the role of evaluating the credibility and receptivity of some reference areas for the online distribution of a topic on social media and specialized sites.

### **III. The impact of online distribution and posting behavior**

The decisions and initiatives adopted by the United Nations are proportionally distributed in the online space according to the mobilization and receptivity of the public to a certain topic. The results presented in Table 3.1. and Graph 3.

Table 3.1. and Graph 3 show the high frequencies of posting behavior according to the days of the week indicating the highest frequencies for all three topics on the day. Saturday of the week (between 35% and 63%), and the lowest at the beginning of the week on Mondays and Tuesdays (between 2% and 9%).

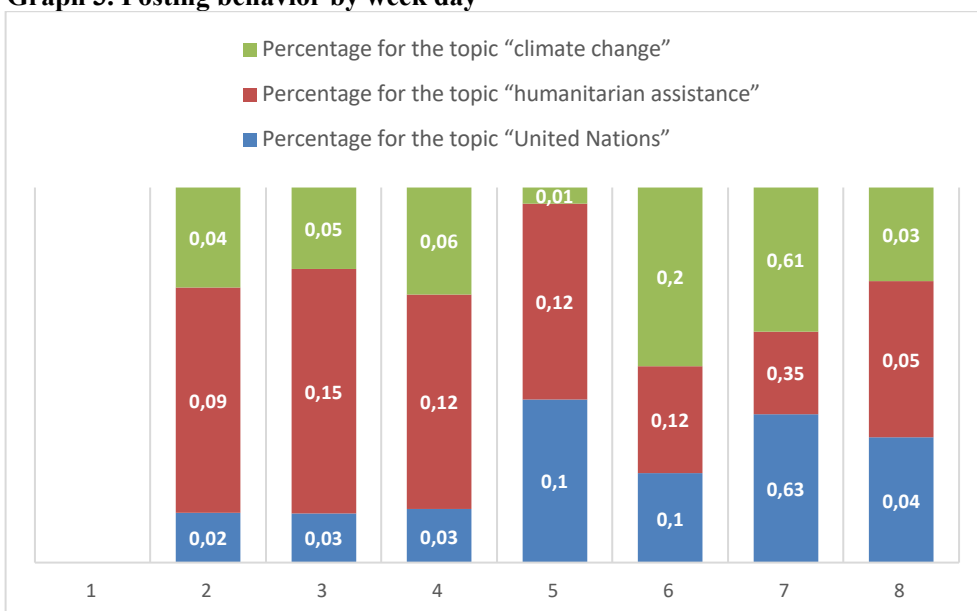
**Table 3. Online distribution and posting behavior by weekdays and time of day**

**3.1. Posts by week day**

Day	Percentage for the topic “United Nations”	Percentage for the topic “humanitarian assistance”	Percentage for the topic “climate change”
Monday	2%	9%	4%
Tuesday	3%	15%	5%
Wednesday	3%	12%	6%
Thursday	10%	12%	1%
Friday	10%	12%	20%
Saturday	63%	35%	61%
Sunday	4%	5%	3%

Source: Authors’ on compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

**Graph 3. Posting behavior by week day**



Source: Authors’ on compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

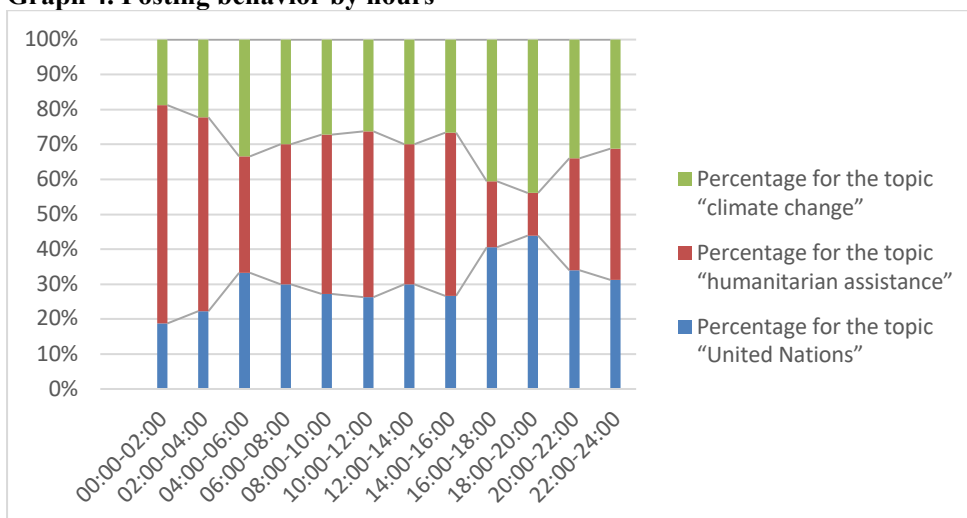
Table 3.2.and Graph 4 present the results of the monitoring of posting behavior according to the time slots of the online posting and distribution. Therefore, the table indicates for all three topics the intervals in the second half of the day starting with 16.00-18.00 (between 7% and 15%) and the interval 20.00-22.00 (between 31% and 33%) as the intervals in which messages and posts are well publicized, proving to be catalysts and referential intervals for digital campaigns and online mobilization at local level. Therefore, the intervals with the highest frequency amplify the role of the messages and engage an increased visibility of the themes highlighted in these documents.

### **3.2. Posts by hour**

<b>Day</b>	<b>Percentage for the topic “United Nations”</b>	<b>Percentage for the topic “humanitarian assistance”</b>	<b>Percentage for the topic “climate change”</b>
<b>00:00-02:00</b>	3%	10%	3%
<b>02:00-04:00</b>	2%	5%	2%
<b>04:00-06:00</b>	3%	3%	3%
<b>06:00-08:00</b>	3%	4%	3%
<b>08:00-10:00</b>	3%	5%	3%
<b>10:00-12:00</b>	5%	9%	5%
<b>12:00-14:00</b>	6%	8%	6%
<b>14:00-16:00</b>	4%	7%	4%
<b>16:00-18:00</b>	15%	7%	15%
<b>18:00-20:00</b>	18%	5%	18%
<b>20:00-22:00</b>	33%	31%	33%
<b>22:00-24:00</b>	5%	6%	5%

Source: Authors’ on compilation based on data retrieved on March 28, 2025 from Social Searcher platform available at <https://www.social-searcher.com/>

**Graph 4. Posting behavior by hours**



## Conclusions

The present study provides the practical and applied foundations for monitoring and evaluating an agenda of ten topics in the field of humanitarian assistance, climate change and public health necessary for the contextualized understanding of humanitarian efforts and the needs of the population. The results of the information research intend to contribute to the efficiency of institutional management and governance, by reporting and identifying emerging trends in the context of social and humanitarian assistance in crisis. The complex examination into discursive practices and online narratives in search for the occurrences of relevant conceptual determinations has evidenced the content creators' particular interventions in shaping perceptions towards events related to humanitarian assistance and public health., several highlighted trends and hypostases in certain periods of time. The examination has followed the traceability of the selected topics within the online content using the digital instruments of Social Searcher platform. By combining a precise and effective set of quantitative and qualitative instruments, the Social Searcher associated the mentions feed and analytics online framework tools, users correlation, links identification, tracing trending topics and concept occurrences, organising online sources, identifying the nodes and wires of discussions, pinpointing topics and frequency scores, accomplishing and highlighting a hierarchy of topics occurrences and profiles visibility. The inquiry has emerged twofold into a quantitative exploration which highlighted a predisposition of users towards the selected items and concepts during the specific monitoring time-frame, while the qualitative interpretation associated an innovative sentiment analysis dimension to humanitarian assistance and security environments, as well as the specific triggers of public online relatedness in terms of response to crisis situations.

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The authors contributed equally to this work.

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## Article Info

*Received:* April 10 2025

*Accepted:* May 20 2025

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### How to cite this article:

Olimid, A. P., Georgescu, C. M., Olimid, D. A., Georgescu, S. D., Gherghe, C. L. (2025). Applied Digital Analysis of UN Legal Content on Humanitarian Assistance, Security and Climate Change Policy: Tracking Social Narratives, Public Engagement and Posting Behavior. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 45 – 57.



## ORIGINAL PAPER

# Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes

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### Abstract:

The interplay between classicism and modernism in English for Specific Purposes (ESP) education presents a dynamic pedagogical landscape. While classicism emphasizes structured grammar, rhetorical precision, and traditional literary texts, modernism fosters adaptability, contextual learning, and interdisciplinary approaches. This paper explores how these two paradigms, often perceived as antagonistic, can complement each other in ESP instruction. It examines the integration of classical methodologies, such as structured syntax and formal discourse, with modern strategies like task-based learning, digital tools, and real-world applications. The study highlights the benefits of balancing these approaches to develop students' linguistic proficiency and professional communication skills. Through case studies and pedagogical analysis, the paper argues that a hybrid teaching model incorporating both classical and modernist elements enhances learners' engagement and practical language competence.

**Keywords:** *ESP, teaching English, language competence, traditional teaching methods, modern teaching methods.*

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# Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes

## 1. Introduction

English for Specific Purposes (ESP) has evolved significantly in recent decades, responding to globalized professional contexts and specialized fields such as business, engineering, medicine, and law. Amid this evolution, the pedagogical tension between classical and modernist methodologies remains a central concern. On the one hand, classicism offers time-tested structures and norms essential for linguistic accuracy. On the other hand, modernism promotes innovation, functional communication, and responsiveness to learners' specific needs. As Lăpădat (2023:253) states, “Over the years, a myriad of teaching methodologies has emerged, each with its unique theoretical underpinnings and instructional strategies.”

Rather than framing these paradigms in opposition, this paper explores the ways they can inform and enrich one another. It proposes that integrating elements of both can lead to a more robust and effective ESP curriculum, equipping learners with both the precision of classical training and the adaptability of modernist approaches.

## 2. Classicism in ESP: Foundations of Precision

Classicism in language instruction is historically rooted in formal education traditions that emphasized mastery of grammar, rhetoric, and canonical texts. In the context of English for Specific Purposes (ESP), classical approaches prioritize structured learning, emphasizing prescriptive grammar, syntactic accuracy, and formulaic expressions suited to formal professional domains.

In ESP courses that serve fields like law, academia, and scientific research, classical methods remain central due to their focus on linguistic precision and rhetorical control. For example, legal discourse relies on highly specialized vocabulary, fixed expressions, and syntactic structures such as passive voice and nominalization. These characteristics make the classicist emphasis on form indispensable. As Bhatia (1993) notes in his seminal work on genre analysis in professional settings, genres such as legal contracts or scientific abstracts demand strict adherence to form and register to maintain clarity and authority.

Classicist instruction in ESP may involve:

- *Intensive Grammar Instruction*: Focus on the correct use of tenses, modals, conditionals, and subject-verb agreement, especially in formal writing.
- *Syntax Drills and Sentence Diagramming*: Practice exercises to master complex sentence structures (common in scientific or technical writing).
- *Rhetorical Modes and Logical Argumentation*: Emphasis on classical rhetorical structures such as deductive reasoning, thesis-antithesis-synthesis, and Aristotelian appeals (ethos, logos, pathos).
- *Imitation of Models*: Learners study and emulate exemplary professional texts (e.g., a legal brief, research article, or formal business letter) to internalize genre-specific language norms.

These methodologies, though traditional, have pedagogical value in cultivating metalinguistic awareness and control over the stylistic features required in high-stakes communication. Widdowson (1983) points out that while communicative approaches stress fluency, they often neglect the importance of form, which remains critical in specialized contexts.

Moreover, ESP learners often need to conform to established discourse communities. Swales (1990) emphasizes that writing for academic or professional

purposes means participating in a community with defined norms, where deviation from stylistic expectations can lead to misunderstandings or a lack of credibility. Thus, classical methods help learners understand and internalize those norms.

### 3. Modernism in ESP: Embracing Context and Change

Modernist approaches to ESP instruction emerged in response to the limitations of rigid, form-focused language teaching. Influenced by sociocultural theory, communicative language teaching (CLT), and constructivist pedagogies, modernist models stress the importance of language as a social tool, shaped by context and purpose. In ESP, this translates into teaching that is highly contextualized, learner-centered, and goal-oriented. The globalisation of technology has significantly transformed language classrooms, offering new opportunities for language acquisition through digital tools that promote active learning and engagement (Lăpădat, 2024:135).

This transformation has further emphasized the need to update the content of instruction. "The information we provide cannot and must not be restricted to traditional structures of grammar, vocabulary and so on. We need to stay connected to an entire apparatus of updated cultural and informational references" (Lăpădat & Lăpădat, 2020:139).

Modernism in ESP embraces:

- *Task-Based Language Teaching (TBLT)*: Learners complete real-world tasks, such as designing a marketing campaign, writing a patient report, or simulating a job interview, where language is learned in use rather than in isolation. Ellis (2003) argues that tasks foster deeper cognitive engagement and improve the transfer of knowledge to real-life contexts.
- *Needs Analysis and Curriculum Customization*: A foundational principle of ESP is its responsiveness to learner needs. According to Hutchinson and Waters (1987), ESP instruction begins with understanding what the learners need English for, be it writing scientific reports, negotiating business deals, or collaborating in international teams. Modernist approaches prioritize this adaptability.
- *Authentic Materials and Contextual Learning*: Instead of relying solely on contrived textbook dialogues or outdated texts, modernist ESP incorporates authentic materials, emails, technical manuals, meeting recordings, scientific articles, which better reflect the communicative demands of learners' target fields.
- *Digital Literacy and Multimodality*: As professional communication increasingly occurs through digital platforms, ESP instruction must also equip learners to write emails, create slide decks, interpret infographics, and participate in webinars. Modernist ESP makes full use of digital tools such as corpora, collaborative writing platforms, and mobile apps to teach both language and digital communication literacy.

Hyland (2006) emphasizes that ESP must acknowledge the "situatedness" of language, how meaning depends not just on words and grammar, but also on genre, audience, and context. In this view, modernist pedagogy aligns well with the demands of contemporary workplaces and academic institutions that value flexibility, collaboration, and real-time communication.

For example, a modernist ESP course for software engineers might include collaborative GitHub documentation tasks, peer code reviews, and agile stand-up meeting

## Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes

simulations. These tasks reflect the professional ecosystem, thus fostering functional and transferable language competence.

### 4. Points of Antagonism

While the integration of classical and modernist pedagogical approaches in ESP instruction holds great potential, it is important to acknowledge that these paradigms are often seen as fundamentally opposed. Classicism, grounded in formality and stability, tends to emphasize a prescriptive view of language. In contrast, modernism prioritizes adaptability, context, and learner agency. These contrasting ideologies lead to several points of tension in instructional philosophy, curriculum design, and classroom practice.

#### 4.1. *Prescriptivism vs. Descriptivism*

One of the core philosophical divides lies in the treatment of language rules. Classical approaches often adopt a prescriptive stance, focusing on "correct" grammar, standardized usage, and fixed rhetorical structures. In contrast, modernist paradigms tend to be descriptive, treating language as a dynamic system shaped by context and usage. As Widdowson (1978, p. 5) notes, traditional instruction focuses on "learning the rules of language usage," whereas modern approaches are more concerned with "learning the rules of language use." This subtle but crucial distinction lies at the heart of the antagonism: classical pedagogy aims for linguistic accuracy, while modernist pedagogy aims for communicative effectiveness. In ESP, this tension becomes apparent when, for example, teaching academic writing: should students strictly follow formal conventions (classicism), or prioritize clarity and audience expectations, which may vary across disciplines and cultures (modernism)?

#### 4.2. *Standardization vs. Customization*

Classical ESP instruction tends to favor standardized curricula and genre templates, such as IMRaD structure in scientific writing or the IRAC format in legal writing. These models provide students with replicable frameworks that promote clarity and conformity within discourse communities. However, modernist approaches, drawing from learner-centered pedagogies, advocate for customization based on learners' goals, industries, and communication contexts. Basturkmen (2010, p. 44) observes that "tensions can emerge when teaching prespecified genre structures while also trying to encourage learner creativity and personal voice." This is particularly evident in professional writing, where genre conventions coexist with the need for innovation or branding, especially in fields like marketing or digital content creation.

#### 4.3. *Top-Down vs. Bottom-Up Learning*

Classicism often employs a top-down pedagogical structure, where language input is controlled and sequenced by the instructor. Students first learn grammar rules and sentence structures, then progress to application. In contrast, modernist ESP encourages bottom-up, inductive learning: learners engage in tasks or authentic texts and derive linguistic rules through guided exploration.

This divergence can lead to classroom friction. For instance, students with a background in classical learning environments may resist the ambiguity and unpredictability of task-based or problem-based learning. Conversely, modernist learners may find classical drills and decontextualized grammar tedious or irrelevant. As Ellis (2003, p. 9) points out, "task-based language teaching rejects the traditional PPP [Presentation–Practice–Production] paradigm in favor of a more experiential, learner-driven approach," which can challenge the expectations of both students and instructors rooted in classical traditions.

#### *4.4. Authority of the Text vs. Fluidity of Meaning*

In classical instruction, the text, whether a sample contract, academic article, or historical speech, is often treated as an authoritative model. Learners are expected to imitate and internalize its structure and style. However, modernist approaches view meaning as fluid, co-constructed by speaker, listener, and context. Swales (1990, p. 58) discusses this tension in his analysis of academic genres, noting that while genres offer useful conventions, they are also "negotiated and dynamic," and can shift across disciplines and rhetorical situations. A purely classical approach risks oversimplifying this reality, while a purely modernist one may fail to give learners clear models to follow.

#### *4.5. Assessment Dissonance*

Assessment practices often reflect the deeper antagonism between classical and modernist frameworks. Traditional ESP courses may favor exams, grammatical accuracy checks, or standardized writing tasks. In contrast, modernist ESP promotes portfolio assessment, self-reflection, and project-based evaluations. This divide raises questions about what constitutes success in ESP learning. Should proficiency be measured by flawless syntax and adherence to conventions, or by the learner's ability to perform effectively in real-world scenarios? The answer often depends on institutional expectations and disciplinary values.

### **5. Towards Complementarity: A Hybrid ESP Model**

While classicism and modernism have historically been positioned in opposition, recent scholarship and pedagogical innovation suggest that a hybrid model, one that draws strategically from both paradigms, can offer a more comprehensive and responsive approach to English for Specific Purposes (ESP). Rather than viewing these traditions as mutually exclusive, effective ESP instruction can benefit from embracing complementarity, combining the rigor of classical methods with the flexibility and contextual awareness of modernist pedagogy.

#### *5.1. Grammar in Context*

One promising strategy for synthesis is the contextualized teaching of grammar. Rather than isolated drills, grammar can be taught through genre-based instruction using authentic texts from the learners' professional fields. For instance, passive constructions, common in scientific writing, can be taught through lab reports or case studies. Similarly, conditional structures can be explored in legal contracts or business negotiations. Hyland (2004, p. 6) advocates for this blended approach, noting that "explicit instruction in grammatical forms is most effective when integrated with meaningful tasks that reflect authentic communicative purposes." This approach satisfies the classical demand for form while fulfilling the modernist emphasis on function.

#### *5.2. Genre Awareness and Rhetorical Flexibility*

Classical training often emphasizes mastery of fixed genre structures, such as the IMRaD model in scientific writing or persuasive essay formats in law and business. Modernist pedagogy, on the other hand, encourages genre flexibility, acknowledging that genres are not static but evolve based on audience, purpose, and medium.

A hybrid approach would train students to recognize core genre conventions while also developing the metacognitive awareness needed to adapt them in different contexts. As Johns (2008, p. 239) states, "ESP practitioners must help learners develop a critical awareness of genres, not just how to use them, but when, why, and how to modify them." This is particularly important in interdisciplinary or international contexts, where rigid adherence to one genre model may not serve diverse communicative goals.

## **Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes**

### *5.3. Technology as a Bridge*

Digital tools offer a powerful means of reconciling classical and modernist approaches. Language corpora, for example, allow learners to study authentic usage patterns of discipline-specific vocabulary and grammar. Tools like AntConc or the BAWE (British Academic Written English) corpus can be used to explore collocations, phraseology, and genre-specific lexis—merging classical attention to form with modernist principles of learner discovery and data-driven learning. Researcher Laviniu Lăpădat describes how digital platforms “have become a powerful unifying force, encompassing the communicative energies of millions of people” (Lăpădat, 2022:83).

In addition, collaborative tools such as Google Docs, Trello, or Miro can facilitate task-based learning, allowing students to apply formal writing skills in real-world digital formats, such as project proposals, user manuals, or pitch presentations. As Gilmore (2007, p. 100) argues, “technology can scaffold learners’ understanding of both form and function, supporting a more holistic and interactive ESP pedagogy.”

We can say that traditional teaching methods often make it difficult for teachers to monitor their students’ progress, as they are unable to track their students’ learning in real-time. However, e-learning allows teachers to easily track and monitor their students’ progress through various tools and technologies that are integrated into the e-learning platforms. This benefit is particularly useful in language teaching, where progress monitoring is critical for achieving the learning objectives (Lăpădat & Lăpădat, 2024:104).

### *5.4. Balancing Evaluation Methods*

Assessment strategies should also reflect this hybrid orientation. Classical assessments, such as grammar quizzes or structured writing tasks, can be complemented by modernist tools such as portfolio-based evaluation, reflective journals, or simulations. This dual approach allows instructors to evaluate both linguistic accuracy and communicative performance.

A well-designed ESP course might include:

- A grammar-focused midterm (classical)
- A collaborative project such as a group business proposal or academic poster (modernist)
- A self-assessment or peer review component to foster metacognitive skills (modernist)

By blending assessment types, educators acknowledge that ESP proficiency involves both control of language structures and the ability to navigate real-world discourse.

### *5.5. Pedagogical Flexibility and Instructor Role*

In a hybrid model, the instructor acts not just as a transmitter of knowledge (a classical role), but also as a facilitator and guide (a modernist role). Teachers must be equipped to shift between these roles based on learners’ needs, proficiency levels, and professional contexts. As pointed out, language learning “does not just mean memorising vocabulary or mastering phonetical, morphological, grammatical or semantic structures, it is, above all, embracing new pathways and methodologies referring to the understanding of life and culture, new visions and perspectives encompassing our national heritage, our Latin sense of belonging and more contemporarily our connection and cohesion to solid and stable European values” (Lăpădat and Păunescu, 2019:205).

According to Dudley-Evans and St John (1998, p. 13), effective ESP instructors are “language experts, content negotiators, and course designers,” who balance linguistic

input with communicative output. Hybrid teaching respects this multifaceted role, empowering instructors to blend explicit instruction with student-centered learning experiences.

## **6. Case Studies and Pedagogical Applications**

The theoretical promise of integrating classical and modernist approaches in ESP instruction finds strong support in actual classroom practice. Across diverse disciplines and cultural contexts, educators have implemented hybrid models that strategically combine the structured rigour of classical pedagogy with the contextual flexibility of modernist strategies. These cases illuminate how complementarity can enhance learner engagement, linguistic precision, and communicative competence.

In a technical English course offered at a university in Japan, engineering students were tasked with preparing written documentation for hypothetical product designs. The course began with a focus on classical grammar structures common in technical writing, such as the passive voice, hedging devices, and formal lexical collocations. Students practiced through sentence-level drills and model analysis of existing patent descriptions and lab reports. However, this classical foundation was soon integrated into a larger, task-based project in which students worked in teams to write a technical specification document and present their prototype in English to a simulated international board of investors. The grammar and lexical features previously learned were now applied in a functional, authentic context. As noted by Iizuka and Unno (2012), such blended instruction improves not only linguistic accuracy but also students' confidence in using English in professional settings.

A similar hybrid approach was employed in a Medical English course at a Spanish university. The course initially used a classicist approach to familiarize students with the rhetorical structure of case reports, clinical narratives, and diagnostic summaries. Learners engaged in close reading of sample reports, focusing on tense usage, transitions, and formal tone. Yet the course moved beyond static textual models by introducing multimodal activities in which students produced video case presentations. These required them to summarize a patient case, simulate a doctor-patient interaction, and deliver a concise, evidence-based recommendation to a professional audience. According to Gallego and Milla Lara (2020), combining classical genre instruction with multimedia and performance tasks helped learners internalize genre conventions while adapting them to real-world communicative environments, including telemedicine and digital health communication.

In India, a Legal English program developed for final-year law students integrated Latin legal terminology and traditional case brief formats (a classical component) with modern interactive activities such as courtroom simulations and podcast scripting. The classical foundation included formal instruction in modal verbs (e.g., shall, may, must) and syntactic structures typical in contracts and judgments. But rather than limiting students to imitative exercises, the course allowed learners to script and record mock legal podcasts on contemporary issues, such as privacy in digital law or environmental litigation. This modernist extension pushed students to tailor their language and tone to specific audiences while maintaining formal accuracy. As Chakravarthi (2019) argues, this kind of integration helps students develop dual literacy, both in traditional legal language and in the informal-professional register increasingly required in public legal discourse.

## **Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes**

These case studies reveal that the hybrid model is not merely a theoretical ideal but a pedagogically feasible strategy. They show that beginning with classical linguistic structures does not preclude authentic, learner-centered activities; rather, it can enhance them. The reverse is also true: engaging learners in meaningful tasks often necessitates a return to classical principles, such as syntactic control or genre structure, to achieve clarity and professionalism.

Furthermore, these applications demonstrate the importance of scaffolding, a concept central to both classical and modernist pedagogies, albeit in different ways. Classical instruction scaffolds through graded grammar instruction and controlled practice, while modernist instruction scaffolds through real-world tasks and feedback cycles. When used in tandem, these techniques provide multiple entry points for learners and help bridge the gap between knowing about the language and using it effectively in context.

The success of these hybrid models also hinges on institutional support and teacher training. Instructors must be comfortable navigating both classical and modernist pedagogies, adapting them based on learner needs, discipline-specific norms, and technological access. In this regard, professional development programs that focus on genre theory, digital pedagogy, and ESP course design are essential to sustaining hybrid innovation in ESP classrooms.

### **7. Conclusion**

The pedagogical landscape of English for Specific Purposes (ESP) is marked by the ongoing interplay between two influential paradigms: classicism and modernism. While often framed as ideologically and methodologically opposed, this paper has argued that these approaches need not exist in antagonism. Instead, they can be integrated into a complementary model that draws upon the strengths of both: the structural discipline of classical instruction and the contextual responsiveness of modernist pedagogy.

Classicism offers indispensable tools for building linguistic precision, rhetorical coherence, and genre awareness, particularly in professional and academic fields where miscommunication carries high stakes. At the same time, modernism brings a necessary flexibility to ESP, promoting learner autonomy, authentic engagement, and adaptability to rapidly changing professional environments. When blended, these approaches can create a dynamic, layered form of instruction that respects both the codified traditions of language use and the communicative realities of the modern world.

The hybrid model described and exemplified in this paper supports the development of ESP learners who are not only accurate but also agile in their use of English. It allows them to internalize formal conventions while being able to modify, negotiate, and innovate across diverse discourse communities. Through pedagogical examples from fields such as engineering, medicine, and law, it is evident that this dual orientation enhances both learner outcomes and instructional efficacy. To this end, “The media today is perceived as an essential component of the modern world” (Lăpădat and Păunescu, 2015:270), making its integration into ESP curricula both relevant and necessary.

In practical terms, this means acknowledging the obstacles learners face. As Stoian (2021:149) observes, “learning a foreign language can be challenging due to the fact that in the first stage, the learner will automatically try to connect the syntax of the new language to the set of grammar rules that exist in his mother-tongue.” These cognitive tendencies require instructors to scaffold learning with both structure and flexibility.

Education is one of the most important factors that define society. It represents the starting engine for all the activities that run within each society (Stoian, 2019:126). Language instruction, therefore, cannot be seen as isolated from broader social goals and must support the development of culturally aware, communicatively competent individuals.

Moreover, “the educational environment confronts us with problem solving situations as a matter of priority” (Bărbuceanu, 2022:183), and teachers must be ready to address them with diversified strategies. As Burtea-Cioroianu (2022:137) argues, “the teaching methods need to be alternated to keep alive the attention and interest of students in online courses.” These insights further bring forth the importance of teacher adaptability in diverse instructional contexts. After all, “different learning styles clearly show that each learner has distinctive characteristics for the appropriation of knowledge” Scorțan (2021:142), hence any effective ESP model must embrace learner diversity and offer differentiated instruction aligned with individual needs,

Crucially, successful implementation of a hybrid model requires thoughtful curriculum design, informed teacher training, and institutional support. Instructors must be empowered to act as both language experts and adaptive facilitators, guiding learners through structured linguistic input and meaningful communicative practice. Moreover, assessment methods must reflect this dual goal, measuring both the command of language form and the capacity to perform in specific communicative contexts.

As ESP continues to expand in scope and complexity, particularly in a globalized and digitally mediated world, a hybrid approach rooted in both classical rigor and modernist innovation offers the most effective path forward. This synthesis not only resolves longstanding pedagogical tensions but also aligns with the evolving demands of learners and the professions they seek to enter. Ultimately, the interplay between classicism and modernism in ESP is not a battleground, but a fertile space for creative and transformative teaching.

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## Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes

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Article Info

*Received:* May 8 2025

*Accepted:* May 25 2025

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**How to cite this article:**

Lăpădat, M. M. (2025). Classicism and Modernism: Between Antagonism and Complementarity in Teaching English for Specific Purposes. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 58–68.



## ORIGINAL PAPER

# Utilising Elements of Art and Literature in Teaching Romanian Culture

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### Abstract :

Art and literature play a crucial role in cultural education, offering profound insights into national identity, values, and traditions. This paper explores the integration of prominent artistic and literary works in teaching Romanian culture to foreign learners. By incorporating visual arts, poetry, prose, and historical narratives, educators can provide a multidimensional understanding of Romania's cultural landscape. The study highlights best practices in selecting and adapting artistic materials for different proficiency levels, fostering intercultural competence, and enhancing student engagement. Case studies illustrate how literature by Eminescu or sculptures by Brâncuși can facilitate a deeper appreciation of Romanian heritage. The paper argues that a well-structured fusion of art and literature in cultural education not only improves linguistic skills but also nurtures critical thinking and cultural sensitivity.

**Keywords:** *Romanian as a second language, teaching Romanian language, culture, art, literature, foreign students.*

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### Introduction

Culture is not simply a backdrop to language, it is its pulse, its rhythm, its atmosphere. In language education, particularly for foreign learners, culture must be taught not as static fact, but as dynamic, lived experience. Romanian culture, with its rich interplay of Eastern and Western influences, offers fertile ground for a teaching approach grounded in the arts. Literature and visual art provide more than illustrative content; they act as windows into Romanian thought, history, values, and emotional landscapes.

Romanian poets, playwrights, sculptors, and painters have long interpreted and reshaped the country's identity. Their works, whether through lyrical contemplation, bold political commentary, or abstract form, allow learners to access Romania's cultural imagination across centuries. By integrating these materials into language and cultural education, instructors can engage students at both intellectual and emotional levels, helping them move beyond surface-level cultural knowledge to a deeper, more embodied understanding.

This paper explores how educators can meaningfully utilise elements of art and literature in teaching Romanian culture, particularly to foreign language learners. The discussion is anchored in educational theory and supported by examples from practice. It addresses the importance of selecting level-appropriate materials, the pedagogical advantages of artistic and literary integration, and the role such approaches play in developing not only language proficiency but also cultural empathy and critical awareness.

### The Role of Literature in Cultural Immersion

Literature is often the most intimate and enduring expression of a culture's inner life. Unlike textbooks or formal instructional materials, literary texts offer access to the textures of thought, emotion, and historical consciousness that shape a national identity. They act as vessels of memory and imagination, capturing the rhythms of speech, the dilemmas of society, and the aspirations of individuals situated within particular times and places. For learners encountering Romanian culture, literature serves not simply as a medium for language acquisition but as a portal into a complex and evolving cultural landscape.

Romanian literature is particularly rich in its capacity to reflect national identity, not only through thematic content but also through its linguistic and stylistic innovations. It encompasses a wide range of voices, from Romantic nationalism and political satire to postmodern fragmentation and post-communist introspection. Each literary period offers a different lens on Romania's cultural evolution, making literature an ideal tool for introducing students to both the diachronic development of Romanian society and the synchronic diversity of its perspectives.

At the center of any literary approach to Romanian cultural education stands Mihai Eminescu. Often described as the soul of Romanian poetry, Eminescu exemplifies how literature can express a collective emotional and philosophical identity. His poetry reflects the Romantic spirit of the 19th century, infused with metaphysical exploration and national symbolism. In works such as *The Morning Star (Luceafărul)* and *I Have One More Longing (Mai am un singur dor)*, Eminescu marries elevated poetic diction with universal themes, unattainable love, spiritual longing, mortality, and cosmic order, anchored in distinctly Romanian imagery and idioms. His verses are not only aesthetically refined but also culturally saturated, making them a powerful means of immersing learners in the national ethos.

## Utilising Elements of Art and Literature in Teaching Romanian Culture

When introduced to students, Eminescu's work becomes more than a reading exercise; it becomes an encounter with a cultural archetype. Even simplified or bilingual versions retain the emotional resonance and philosophical complexity of the original. In a classroom context, *The Morning Star* offers layered opportunities for exploration: on the surface, it can be discussed as a tragic love story between a celestial being and a mortal girl; on a deeper level, it provokes questions about identity, time, and the limitations of human desire. Through such analysis, students are not only improving their reading comprehension and vocabulary, but also developing interpretive skills and cultural literacy. Engaging with the poem's symbolism, its musicality, and its philosophical structure enhances their understanding of Romanian Romanticism and its role in shaping national identity during a time of political awakening.

Beyond the idealism and introspection of Eminescu lies a very different voice in Ion Luca Caragiale. Caragiale's contribution to Romanian literature is notable not for its lyricism, but for its sharp wit and keen observation of social life. As a playwright and short story writer, Caragiale captured the absurdities and contradictions of Romania's bureaucratic and political classes during the late 19th and early 20th centuries. His characters are drawn from the urban middle class, and his dialogues reflect colloquial Romanian with all its humor, irony, and emotional volatility. For language learners, this presents a unique opportunity to engage with authentic, conversational language, while simultaneously developing an understanding of the social structures and tensions of the time.

Caragiale's works lend themselves well to interactive pedagogy. Scenes from plays such as *A Lost Letter* (*O scrisoare pierdută*) can be performed in class, allowing students to practice pronunciation, rhythm, and gesture in a communicative setting. Role-playing fosters engagement and deepens the emotional connection to the text, as students are encouraged not only to understand the lines but to embody the social and psychological dynamics of the characters. Through this process, learners move beyond language drills and into the realm of cultural performance, where literature is experienced as living dialogue.

While Eminescu and Caragiale represent foundational voices in Romanian literature, more contemporary authors such as Herta Müller and Mircea Cărtărescu introduce new dimensions of cultural reflection. Their works explore themes of memory, trauma, exile, and identity, particularly in the context of Romania's 20th-century history. Müller's writing, often fragmented and poetic, grapples with the psychological impact of dictatorship, surveillance, and displacement. Her narratives delve into the inner lives of individuals who live under repression, offering readers a visceral understanding of fear, alienation, and resilience. (Haines, 1998). For students, engaging with this literature offers a bridge between historical fact and emotional truth, allowing them to grasp the lived consequences of political ideology and state violence.

Mircea Cărtărescu, by contrast, represents a more introspective and postmodern turn in Romanian literature. His writing is marked by introspection, surreal imagery, and autobiographical layering, drawing readers into a dreamlike yet hyper-real landscape. His novels often blur the boundaries between memory and fiction, history and imagination. Teaching Cărtărescu involves guiding students through complex linguistic structures and metaphorical density, making it most suitable for advanced learners. Yet even short passages or translated excerpts can stimulate deep discussion about identity, urban life, and the shifting boundaries of personal and collective memory.

Contemporary authors like Herta Müller and Mircea Cărtărescu offer a more experimental and critical take on modern Romanian identity. While suitable for advanced learners, their works highlight post-communist complexities and personal memory, pushing students to think beyond the stereotypical representations of Eastern Europe. In this sense, literary texts, when approached through a communicative and contextualized lens, can enhance vocabulary, deepen grammatical understanding, and engage learners in cultural reflection through the voices and experiences of specific Romanian writers.

### Visual Arts as Cultural Texts

If literature allows learners to read a culture's voice, visual art allows them to see its soul. Romanian visual culture offers a multifaceted narrative of identity, ritual, and historical continuity. From peasant art forms and religious iconography to modernist abstraction, visual texts encode a set of values, emotions, and symbolic structures that can be powerfully integrated into the teaching of Romanian language and culture. Used effectively, visual art in the classroom becomes more than illustration, it functions as a semiotic system that complements and expands textual interpretation.

At the center of Romanian 20th-century visual art stands Constantin Brâncuși, whose sculptural work bridges the folk traditions of his birthplace with the avant-garde movements of Paris. Sculptures such as *Coloana Infinitului* (*The Endless Column*), *Sărutul* (*The Kiss*), *Masa Tăcerii* (*The Table of Silence*), or *Pasărea în văzduh* (*Bird in Space*) have become globally recognized symbols of spiritual and formal exploration. These works, though minimalist in appearance, are saturated with Romanian cultural references. (Bach et al., 1995)

*Coloana Infinitului* (*The Endless Column*, 1938), located in Târgu Jiu, is perhaps Brâncuși's most iconic Romanian installation. Composed of repeating rhomboidal modules, the column is a memorial to Romanian soldiers who died in World War I. In a classroom setting, students can be invited to analyze the symbolism of the column's upward repetition, connecting it to concepts of sacrifice, transcendence, and national memory. The form's roots in Romanian wooden spindle motifs (*fusul*) can be examined through parallel images of traditional Maramureș textile tools, highlighting how Brâncuși abstracted vernacular design into metaphysical sculpture. Language learners can describe the column using vocabulary related to geometric form (*romboid*, *coloană*, *înălțime*), material (*fontă*, *alamă*), and emotion (*memorie*, *eternitate*). (Geist, 1983)

*Sărutul* (*The Kiss*, 1907–08) also provides a deeply Romanian reinterpretation of a universal theme. Unlike Rodin's sensual, dynamic depiction, Brâncuși's sculpture presents two highly stylized figures in a rigid, frontal embrace, with conjoined eyes and unified form. This simplification, echoing funerary monuments in southern Romania, transforms romantic love into a spiritual and communal act. Teachers might pair *The Kiss* with fragments from traditional Romanian love poems or wedding customs, asking students to discuss how affection and partnership are visually and ritually represented. In terms of language instruction, this artwork supports vocabulary related to the body (*ochi*, *braț*, *chip*), emotion (*dragoste*, *unire*), and material (*piatră*, *sculptură*).

*Pasărea în văzduh* (*Bird in Space*, 1923) marks a departure from literal folk forms into pure abstraction. Yet even here, Brâncuși's inspiration is not disconnected from Romanian spirituality. The bird motif relates to soul flight in Romanian mythology, particularly in funerary songs such as *Cântecul Zburătorului*. In the classroom, this work can be used to explore themes of ascension and transformation. Students can compare *Bird in Space* with Orthodox icons of the Holy Spirit (often depicted as a dove), or with

## Utilising Elements of Art and Literature in Teaching Romanian Culture

mythological birds from Romanian folklore such as Pasărea Măiastră. The simplicity of the form also opens discussion on the relationship between material and metaphor. Language tasks might include interpreting the sculpture's title, describing its reflective surface, and imagining its movement or sound using Romanian poetic devices.

Brâncuși's methodology, transforming folk motifs into universal forms, can be extended pedagogically by linking his work to *vernacular Romanian visual arts*, especially those found in village culture. Traditional wood carving (*sculptura în lemn*), particularly from Maramureș, is one of the most visually rich elements of rural Romanian life. Ornamental wooden gates (*porți maramureșene*), adorned with solar rosettes (*rozete solare*), rope motifs (*funia vieții*), and tree-of-life patterns (*pomul vieții*), serve as powerful cultural texts. In the classroom, these gates can be introduced via high-resolution images or short videos showing artisans at work (Lemny, 2005). Students can be guided to label parts of the gate, describe the symbolic motifs, and compare the gate to symbols in their own culture's architecture. A task might involve preparing a short oral presentation or written description of a gate's features, incorporating specific vocabulary (*poartă, stâlp, motiv tradițional, sculptură*).

*Embroidery (broderia)* is another traditional Romanian art form that can serve as a visual narrative of regional identity. Different regions, such as Oltenia, Bucovina, and Transylvania, use distinct color schemes, patterns, and stitch types in their traditional blouses (*ii*). These garments are visual markers of social status, geographic origin, and cultural memory. Teachers might introduce images of traditional costumes from each region, asking students to identify differences, describe patterns, or interpret the meaning of recurring symbols such as crosses, stars, or animal figures. For language acquisition, this activity supports vocabulary in textiles (*pânză, cusătură, ață, model*), colors, and regional terms.

A particularly rich visual tradition lies in *Orthodox icon painting (icoane)*, which blends Byzantine aesthetics with local stylistic adaptations. Icons in Romanian churches and monasteries often feature saints, biblical scenes, and celestial hierarchies, rendered in tempera and gold leaf on wooden panels. These images are not only religious objects but also visual commentaries on suffering, protection, and spiritual transformation. Introducing icons in class can be tied to thematic units on holidays, moral values, or religious language. For example, during a lesson on Easter customs, students might study the icon of *Învierea Domnului (The Resurrection of the Lord)* and identify figures, gestures, and narrative sequences. Activities may include describing what they see, sequencing the story depicted, or matching labels to iconographic elements (*aură, cruce, înger, apostol*).

Another effective classroom application involves using *funerary crosses from Săpânța*, part of the *Merry Cemetery (Cimitirul Vesel)*. Each cross combines a carved, painted portrait of the deceased with a short poem that humorously or honestly describes their life and death. This tradition offers a rare mix of visual art, biographical narrative, and poetic language. Teachers can use photographs of these crosses as prompts for both reading and creative writing tasks. Students might be asked to interpret the epitaphs, discuss the life story presented, or write a similar short text about a fictional character. This supports narrative structure, descriptive language, and cultural analysis, while exposing learners to regional variation and Romanian attitudes toward mortality.

In the modern and contemporary period, Romanian visual culture continues to develop through photography, installation, and experimental art. Introducing works by artists such as Geta Brătescu or Ion Grigorescu can prompt students to explore topics such

as identity, gender, urban life, or political resistance. Brătescu's collage work and textile-based installations can be paired with vocabulary related to shapes, textures, and spatial relationships, while Grigorescu's documentary photography of communist Romania invites reflection on historical change. Although more abstract and challenging, these materials are suitable for advanced learners who can engage with layered symbolic and socio-political meaning.

For beginner and intermediate learners, however, the strength of visual materials lies in their immediate legibility. A photograph of a painted monastery from Bucovina, such as *Voroneț*, with its vivid *Judgment Day* fresco (*Judecata de Apoi*) can support lessons on color, architectural vocabulary, and religious festivals. Students may identify and describe figures in the fresco, name colors, or construct sentences about what each person is doing, allowing for natural use of present tense and action verbs.

Visual prompts also enable the integration of comparative culture. A unit on rural life might involve side-by-side images of Romanian and foreign village architecture, agricultural practices, or seasonal rituals. Using curated visual materials, paintings, photographs, maps and objects, teachers can build learning sequences that alternate between description, interpretation, and cultural storytelling.

Ultimately, Romanian visual art forms, whether carved into wood, painted on walls, stitched into fabric, or cast in bronze, are more than aesthetic artifacts. They are semiotic systems that convey values, identities, histories, and mythologies. In language education, they function not only as support tools for vocabulary acquisition but as full-fledged cultural texts. When used deliberately, they allow students to decode Romanian culture not just as observers but as participants in its visual and symbolic language.

### **Pedagogical Strategies for Integration**

Effectively integrating Romanian art and literature into the language and culture curriculum demands deliberate planning, sensitivity to learners' needs, and an adaptable pedagogical framework. The complexity and richness of Romania's cultural heritage offer a wealth of material, but not all texts, genres, or visual works are accessible to all students in the same way. Instructors must assess language proficiency, cognitive readiness, learning objectives, and the sociocultural context of learners when designing cultural units that combine both literary and visual components.

A foundational principle for such integration is "scaffolding", the strategic sequencing of materials and tasks to support gradual learning, a concept rooted in Vygotskian sociocultural theory. Scaffolding refers to the process by which teachers provide support structures to help learners achieve tasks slightly beyond their current level of competence (Vygotsky, 1978; Wood, Bruner, & Ross, 1976). One key challenge in the initial stages of learning Romanian is the learner's tendency to impose familiar grammatical frameworks onto the new language. As Stoian (2021:149) observes, "learning a foreign language can be challenging due to the fact that in the first stage, the learner will automatically try to connect the syntax of the new language to the set of grammar rules that exist in his mother-tongue." This phenomenon reinforces the need for carefully sequenced exposure to authentic Romanian syntax through simplified texts, bilingual resources, and guided practice.

For literary content, scaffolding may begin with simplified or adapted texts. In the case of *Luceafărul* (*The Morning Star*) by Mihai Eminescu, a teacher might first introduce the narrative structure in simplified prose, followed by selected stanzas with glossed vocabulary, and finally allow students to explore the original verse in full.

## Utilising Elements of Art and Literature in Teaching Romanian Culture

Supplementary tools such as bilingual editions, recorded readings by Romanian actors, visual storyboards, or animated summaries can ease entry into complex poetic language. Learners might first identify characters, settings, and key events before analyzing metaphors or philosophical ideas.

For visual arts, scaffolding can take the form of a progression from observation to interpretation. When presenting *Coloana Infinitului* (*The Endless Column*) by Constantin Brâncuși, beginner students might start by describing the physical aspects of the sculpture using targeted vocabulary: *înaltă, aurie, repetitivă, abstractă*. Next, students might match images to descriptions, answer comprehension questions, or label diagrams. Only after this foundational understanding is in place should learners be asked to interpret symbolism, such as the idea of infinity, repetition, or ascension. Teachers can provide sentence frames or guiding questions in Romanian to help structure students' responses: *Ce simbolizează coloana? De ce crezi că artistul a ales această formă?*

Thematic organization of content offers another highly effective strategy, allowing for coherence across disciplines and text types. As Richards and Rodgers (2014) suggest, thematic organization allows learners to encounter vocabulary and ideas in multiple contexts, reinforcing retention and comprehension. A thematic unit entitled “Dragoste și dor” (*Love and Longing*) could incorporate a poem by Eminescu (*Mai am un singur dor / I Have One More Longing*), Brâncuși's sculpture *Sărutul* (*The Kiss*), and a folktale such as *Fata moșului și fata babei* (*The Old Man's Daughter and the Old Woman's Daughter*). These texts can be taught in parallel, with each addressing a different facet of love - romantic, spiritual, or familial. Language activities may include comparing adjectives used to describe emotions across the texts, identifying similar themes in visual and verbal forms, or rewriting the ending of a folktale to align with a modern view of relationships.

Thematic units can also respond to historical and political themes. A unit on “Exile and Memory” might include excerpts from Herta Müller's prose, images of Geta Brătescu's *Jurnal* (*Journal*) series, and oral histories or interviews from Romanian emigrants. Learners could analyze how trauma and loss are conveyed through metaphor, silence, or fragmentation. Tasks might include writing journal entries from the perspective of a character, analyzing visual symbols of confinement, or creating timelines that pair historical facts with literary representations. Such a unit not only teaches grammar and vocabulary related to past tense, emotions, and location, but also fosters critical reflection on migration, identity, and memory.

To activate students' linguistic and cognitive engagement, task-based learning (TBL) is particularly effective. TBL is grounded in the belief that meaningful communication should be central to language learning, and that tasks resembling real-world activities promote authentic use of the target language (Ellis, 2003; Willis & Willis, 2007). One example of a high-engagement task is the creation of a visual reinterpretation of a literary scene. After reading Ion Luca Caragiale's *Două loturi* (*Two Lottery Tickets*), students might be asked to storyboard the main scenes as a graphic narrative. This allows for a review of plot and character while promoting vocabulary related to daily life, luck, and emotion. In small groups, students can assign dialogue, choose visual elements that reflect the satirical tone, and present their final products to the class.

Multimodal learning, which incorporates text, image, sound, and performance, has become increasingly recognized as essential for engaging diverse learners and addressing multiple literacies (Cope & Kalantzis, 2000; Kress, 2003). Projects such as curating a virtual exhibit of Romanian cultural artifacts—combining captions, recordings,

and oral presentations—require students to synthesize knowledge across disciplines and formats. These activities promote deeper cultural engagement while addressing all four language skills: reading, writing, speaking, and listening. For a final unit project, students could curate a virtual exhibition titled “What Is Romania?” selecting 3–5 works of art or literature studied during the semester. Each item would be accompanied by a short bilingual caption and a spoken tour guide script in Romanian. This kind of project requires summarizing, describing, analyzing, and presenting—integrating all language domains while deepening cultural insight.

Reflective and comparative writing tasks further reinforce intercultural competence. In line with Byram’s model of intercultural communicative competence (Byram, 1997), students should be encouraged not only to learn about Romanian perspectives but to reflect on their own cultural assumptions and experiences. A writing assignment comparing Romanian “*ie*” blouses with garments from students’ own cultures can develop skills in cultural comparison, description, and critical thinking. Such assignments foster intercultural discovery, the ability to interpret documents and practices from another culture, and relate them to one’s own.

In more advanced classrooms, students can be invited to conduct critical discourse analysis of Romanian cultural texts. For example, analyzing Caragiale’s satirical language in *O scrisoare pierdută* (*A Lost Letter*) offers insight into how rhetoric and humor function in Romanian political discourse. Encouraging students to identify patterns of manipulation, irony, or euphemism not only deepens language awareness but also trains them in socio-pragmatic competence—a skill particularly relevant in global and multicultural contexts (Celce-Murcia, Dörnyei, & Thurrell, 1995).

Throughout these strategies, a consistent pedagogical goal must be critical engagement. This involves teaching students to interrogate, rather than merely absorb, the cultural representations they encounter. As Kramsch (1993) argues, culture in language teaching must be taught as discourse, not as a list of facts or products. For example, a unit examining the *Cimitirul Vesel* (*Merry Cemetery*) at Săpânța may begin with decoding epitaphs and carved portraits, but should also open into discussion about Romanian attitudes toward death, humor, and memory. Students should be encouraged to ask: What does this suggest about Romanian cultural values? How might it challenge Western norms about mourning and commemoration?

Romanian culture, like any culture, should not be presented as monolithic, exotic, or frozen in time. Instructors must encourage students to interrogate texts and ask questions such as: Whose voice is represented? Whose voice is missing? What assumptions are embedded in this image or narrative? For instance, when reading *Pădurea spânzuraților* (*The Forest of the Hanged*) by Liviu Rebreanu, students might explore how national identity conflicts with personal conscience, and what that reveals about war, duty, and belonging.

Cultural products, whether a Brâncuși sculpture or a poem by Nichita Stănescu, can also provoke transnational comparisons. A unit on memory might include images from the *Memorialul Victimelor Comunismului și al Rezistenței* (*Memorial to the Victims of Communism and to the Resistance*) in Sighet, alongside a discussion of memory politics in students’ home countries. Instructors can facilitate open-ended group discussions, debates, or case studies that examine both differences and shared challenges. Such critical engagement is central to transformative learning, an approach that goes beyond linguistic outcomes to reshape students’ perceptions and worldviews. Mezirow (1991) defines transformative learning as a process of critically examining one’s assumptions, engaging

## Utilising Elements of Art and Literature in Teaching Romanian Culture

in dialogue, and reconstructing meaning. In the context of Romanian culture, transformative tasks might include examining how Brâncuși's *Pasărea în văzduh* (*Bird in Space*) redefines form and motion, or how Müller's minimalist prose articulates trauma without overt narrative closure.

To support these approaches, it is essential to sequence activities intentionally, design assessment tools that capture cultural understanding, and allow for learner autonomy. Students should have opportunities to select texts, interpret symbols, and co-construct meaning with peers. Language classrooms, when enriched by Romanian art and literature, become dynamic spaces of intellectual and cultural exchange.

To that end, digital tools and mobile learning strategies offer promising avenues for engaging learners. Incorporating mobile apps, digital storytelling tools, and online collaborative platforms can complement the use of traditional texts and artworks. As Lăpădat (2023:267) notes, "The integration of mobile technology in language education has facilitated an environment conducive to continuous and engaging vocabulary learning, significantly enhancing learners' interaction with the target language."

Equally important is addressing the problem-solving nature of real-time classroom dynamics. Teachers must be ready to adapt to diverse learner needs, spontaneous challenges, and evolving classroom contexts—especially in online or hybrid settings. Flexibility in teaching style, paired with varied learning tasks—from visual analysis and literary interpretation to group debates and creative writing—helps maintain engagement and supports diverse learning preferences.

### Intercultural Competence through Aesthetic Experience

Beyond linguistic proficiency and cultural literacy, one of the most profound goals of language education is the development of intercultural competence—the ability to navigate, interpret, and engage with cultural differences in meaningful and respectful ways. Art and literature serve as powerful vehicles in this process, not only because they communicate values and beliefs, but because they engage learners in aesthetic experience, which can be deeply transformative.

When students encounter a Romanian poem, painting, or piece of folk music, they are not just receiving information, they are entering into an emotional and imaginative relationship with another worldview. This aesthetic experience has the potential to shift perspectives, challenge assumptions, and cultivate empathy. It is not uncommon for students, when reading a melancholic verse by Nichita Stănescu or listening to a *doina* lament, to feel an emotional resonance that transcends language barriers. Such moments, often difficult to quantify, play a crucial role in shaping learners' attitudes toward the target culture.

The emotional engagement that art and literature evoke helps to dismantle the notion of culture as a distant or static object. Instead, culture becomes something alive, complex, and personal. A foreign learner who writes a response poem to Luceafărul, or who reimagines one of Brâncuși's sculptures through their own cultural lens, is not just learning about Romanian culture, they are entering into a dialogue with it. This dialogic approach fosters respect for difference while also highlighting shared human experiences, such as love, loss, longing, and resilience.

Moreover, these aesthetic encounters allow for critical reflection. Rather than presenting Romanian culture as a monolith or a list of customs, teachers can use art and literature to invite students to question and interpret. For instance, students might be asked: What does national identity mean in Eminescu's time versus today? How do the

themes in Romanian literature compare with those of their own countries? What does it mean for Brâncuși to take traditional forms and rework them in an international modernist style? These questions not only develop analytical skills, but also prepare students to engage with cultural difference in a thoughtful and informed manner.

Importantly, the development of intercultural competence through art and literature is bidirectional. Learners do not passively absorb Romanian culture, they reflect upon it, respond to it, and sometimes critique it from their own perspectives. This co-creative process reinforces the idea that culture is not a closed system but an evolving conversation. Encouraging students to draw parallels between Romanian artistic expressions and those from their own backgrounds allows them to appreciate both the uniqueness and the universality of human expression.

In a time marked by increasing global mobility and cultural contact, such competencies are more important than ever. Students who learn to interpret a painting, understand a historical novel, or feel the mood of a poem are acquiring more than vocabulary, they are gaining tools to understand otherness, to listen across difference, and to build bridges through beauty and meaning.

### Conclusion

Integrating art and literature into the teaching of Romanian culture is not merely an aesthetic choice, it is a pedagogical necessity. These elements illuminate the depths of Romanian identity, offering learners the opportunity to engage with the language in holistic, meaningful, and transformative ways. From the timeless lyricism of Eminescu to the sculptural abstractions of Brâncuși, Romanian creative expression provides fertile ground for language learning infused with cultural resonance. When adapted thoughtfully to learners' needs, artistic and literary texts can foster linguistic competence, critical thinking, intercultural sensitivity, and emotional engagement.

Lăpădat (2022) aptly describes the RL2 learning journey as “a transition, a metamorphosis of the struggle to communicate ideas,” highlighting how the learning of Romanian as a second language transforms not only linguistic proficiency but also cognitive and emotional insight. Language learners do not simply accumulate vocabulary and grammar—they are shaped by the cultural narratives they encounter and the emotional engagements they experience along the way. Moreover, the transformation of the learner demands a dynamic pedagogical response. The information we provide cannot and must not be restricted to traditional structures of grammar, vocabulary and so on. We need to stay connected to “an entire apparatus of updated cultural and informational references” (Lăpădat & Lăpădat, 2020:139). In this light, cultural education must move beyond rote learning and embrace multimedia, current events, and evolving cultural expressions.

Adapting to the complexities of the educational landscape is crucial. “The educational environment confronts us with problem solving situations as a matter of priority” (Bărbuceanu, 2022:183). Language educators must adopt a flexible, responsive approach that can accommodate spontaneous challenges, differing proficiency levels, and varying levels of cultural familiarity.

This need for adaptability is especially pronounced in digital contexts. As Burtea-Cioroianu (2022:137) states, “the teaching methods need to be alternated to keep alive the attention and interest of students in online courses.” Teachers who rotate between visual analysis, creative writing, live discussion, and project-based learning can more effectively maintain student engagement and promote retention.

## Utilising Elements of Art and Literature in Teaching Romanian Culture

Ultimately, no pedagogical approach can succeed without an understanding of learner diversity. As Scorțan (2021:142) reminds us, “these different learning styles clearly show that each learner has distinctive characteristics for the appropriation of knowledge.” A student-centered model that recognizes individual differences, cultural background, and cognitive style is essential to successful language acquisition and intercultural competence.

In a world increasingly shaped by cross-cultural interaction, language education must do more than teach communication. It must teach understanding. Through the integrated use of Romania’s artistic and literary heritage, educators can open doors not just to a language, but to the imagination and history of a people. And in doing so, they invite learners into a shared human story—told in lines of verse, in brushstrokes and stone, in memory and voice.

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**Article Info**

*Received:* May 08 2025

*Accepted:* May 22 2025

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**How to cite this article:**

Lăpădat, L. C. (2025). Utilising Elements of Art and Literature in Teaching Romanian Culture. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 69 – 80.



## ORIGINAL PAPER

# Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination

Daniela Isabela Scarlat<sup>1)</sup>, Cristina Stanciu<sup>2)</sup>

### Abstract:

The rule of irrevocability of contracts, regulated by the provisions of Article 1270 of the Civil Code, expresses the principle that a contract may be modified or terminated only by mutual agreement of the parties or for reasons authorized by law. Article 1321 of the Civil Code enumerates the cases in which a contract may be terminated: by performance, by mutual agreement of the parties, by unilateral termination, by expiration of the term, by fulfillment or, as the case may be, non-fulfillment of a condition, or by fortuitous impossibility of performance. In the field of transport contracts, however, the Civil Code derogates from these provisions and grants the sender the right to unilaterally renounce or modify the contract. The legal act by which the sender unilaterally modifies the transport contract is called a countermand. Thus, according to Articles 1970-1975 of the Civil Code, the sender has the right to suspend the transport and request the return of the transported goods, their delivery to a person other than the one indicated in the transport document, or to dispose of them as they see fit. However, the sender is obligated to pay the carrier for expenses incurred and compensate for any immediate damages resulting from the countermand. Unilateral Termination is a mechanism through which one of the contracting parties may terminate the contractual relationship. In the Romanian Civil Code, this concept is regulated based on the type of contract and the specific conditions applicable in each case. According to Article 1276, paragraph 2 of the Civil Code, in contracts involving successive performance (e.g., lease agreements, insurance contracts), unilateral termination is permitted, provided a reasonable notice period is observed. The Civil Code allows the beneficiary of a service contract to unilaterally terminate it, with the obligation to reimburse the service provider for the expenses incurred and compensate for the portion of the work already performed.

The parties may include specific clauses in the contract allowing unilateral termination, establishing conditions such as a minimum notice period, the payment of compensation, and written notification of the other party.

**Keywords:** *countermand, irrevocability, unilateral termination*

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**Principles governing the effects of civil legal acts – general rules applicable to most civil contracts.** A civil legal act represents a manifestation of will made with the intention of producing legal effects, namely to create, modify, or extinguish a civil legal relationship. The effects of a civil legal act are governed by a series of essential legal principles that ensure the stability, fairness, and predictability of legal relationships. These principles apply to the majority of civil contracts and reflect a balanced approach between the parties' freedom of will and the protection of their legitimate interests. The correct understanding and application of these rules is an essential condition for the safe and lawful conduct of civil legal relations. These principles provide coherence and stability to legal relationships and reflect the core values of private law.

*The principle of the binding force of the legal act* is regulated by Article 1270 of the Civil Code, according to which “a lawfully concluded contract has the force of law between the contracting parties” (Article 1270 Civil Code). The phrase “has the force of law” signifies a “transfer” of authority from the law to the lawfully concluded contract (Bularca, 2023: 63). Based on this legal text, it follows that the parties are bound to strictly observe the agreed clauses, and no party may unilaterally withdraw from the contract, except in cases permitted by law or by the parties' agreement. Such intervention must, however, be justified by truly exceptional interests, as in principle, such interference is incompatible with the rules of the rule of law (Pop, Popa, Vidu, 2020: 86).

*The principle of the relativity of the effects of the legal act*, as provided by Article 1280 of the Civil Code, expresses the idea that the legal act produces effects only between the parties who concluded it and, under limited conditions, in relation to third parties (e.g., stipulation for another, oblique or Paulian actions, effects concerning universal or universal title successors), since third parties cannot be bound by a contract to which they were not parties. However, the binding force of a contract may extend to certain third parties, referred to as “successors in title,” who did not participate in the conclusion of the contract but are nonetheless affected by its legal consequences (Veress, 2023: 79).

*The principle of the opposability of the effects of the contract* expresses the notion that a contract produces effects not only between the contracting parties (according to the principle of relativity) but also in relation to third parties, within certain limits, through the recognition of the contract's legal factual effects. This rule does not mean that third parties become bound by the contract, but rather that they must acknowledge and not hinder its effects where the law so provides. Through opposability, contracts gain effectiveness not only between the parties but also within the general legal order, being safeguarded against unjustified third-party interference. This principle ensures the security of civil transactions and protects already established legal relationships.

*The principle of the irrevocability of the civil legal act* reflects the rule that, once validly concluded, a legal act cannot be unilaterally revoked by one of the parties. It produces binding and stable effects, reflecting a will freely and consciously expressed.

Of particular relevance to this study is the analysis of the functionality of the principle of binding force and, especially, as a consequence thereof, the development of the principle of irrevocability.

The irrevocability of the civil legal act, whether considered a consequence of the principle of binding force or regarded as an autonomous principle governing the effects of legal acts, expresses the idea that a bilateral or multilateral legal act cannot be annulled through the unilateral will of one of the parties, and in the case of a unilateral legal act, its author may not retract their own manifestation of will.

## **Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination**

This irrevocability derives from the principle of binding force, representing both a direct consequence and a guarantee of its application. Thus, the rationale underlying the principle of binding force also serves as the foundation for the irrevocability of civil legal acts.

Termination of a Civil Contract is regulated by the Romanian Civil Code depending on the cause of termination (Article 1321 Civil Code). A contract terminates, under the conditions provided by law, through performance (the most natural form of termination), mutual agreement of the parties (the parties may agree, based on the principle of contractual freedom, to bring an end to a previously concluded contract), unilateral termination (permitted if provided by law—e.g., employment contracts, indefinite duration service contracts—or stipulated by the parties' agreement), expiry of the term (the contract ends upon the expiration of the period provided), fulfillment or, as the case may be, non-fulfillment of a condition, fortuitous impossibility of performance (when, due to reasons not attributable to the parties, the object of the obligation becomes impossible to perform, the contract is terminated by operation of law), as well as any other causes provided by law (rescission/termination, annulment, death/incapacity of a party).

In practice, it is essential that termination occurs in accordance with the provisions and formalities set out in the Civil Code in order to avoid litigation or claims for damages.

It is important to note that most forms of termination are grounded in the fundamental principles of civil law: freedom of will, equity, and good faith. These offer the parties a flexible yet rigorously regulated legal framework. Article 1321 of the Civil Code serves as a general legal standard in the matter of civil contract termination. The diversity of termination methods reflects the complexity of contractual legal relationships and provides tools suited to the specific circumstances of each contract. In all cases, compliance with legal provisions and general principles of civil law ensures a fair and effective termination of the contract.

Among the forms of termination listed in the above-mentioned article, this paper focuses on the mechanism of termination by unilateral denunciation.

As previously stated, Article 1270 (2) of the Civil Code acknowledges the possibility of terminating a contract by mutual agreement of the parties, which is a natural expression of the principle of freedom of legal acts. Thus, just as a contract is formed by mutual consent (*mutuus consensus*), it may likewise be ended by mutual dissent (*mutuus dissensus*) (Boilă, Luntraru, 2023: 87).

The possibility of unilateral revocation of contracts requires a differentiated analysis, depending on whether the contract is concluded for a fixed term or for an indefinite period.

The Civil Code establishes certain rules regarding the unilateral revocation of contracts, using the term “unilateral denunciation,” which is governed by Articles 1276 and 1277. These provisions set forth a series of rules that must be supplemented by specific legal provisions applicable in particular matters (Pop, Popa, Vidu, 2020: 129).

Article 1276 of the Civil Code regulates certain aspects regarding the unilateral denunciation of a fixed-term contract. It is considered that this provision is not limited to cases expressly provided by law but allows the parties to include a termination clause in any type of contract, except where the law explicitly prohibits it. In this context, it has been argued that unilateral termination agreed upon by the parties does not constitute an exception to the principle of binding force of the contract but is instead an expression of their freedom of will, being accepted and anticipated through their initial agreement

(Nicolae, 2000–2001: 63). However, other opinions view the inclusion of such a clause as an exception to the principle of binding force (Boilă, Luntraru, 2023: 87).

According to Article 1276(1) of the Civil Code, titled “Unilateral Denunciation,” when a party is granted the right to denounce the contract, this right may be exercised only before the commencement of performance.

In the case of contracts characterized by successive or continuous performance, denunciation may be effected even after performance has begun, provided that a reasonable notice period is observed. However, such denunciation shall not affect obligations already performed or in the course of performance (as per Article 1276 (2) Civil Code). Nonetheless, the effects of termination shall not extend to services or obligations already executed or underway.

If the contract provides for a consideration in exchange for termination, such consideration shall produce legal effects only to the extent that it is actually performed. It can thus be concluded that, in the case of fixed-term contracts, the law accepts both termination for consideration (onerous termination) and termination without consideration (gratuitous termination). An example of onerous termination is regulated by Article 1545 of the Civil Code, in the form of penalty earnest money. According to this provision, “if the contract expressly stipulates the right of one or both parties to withdraw from the contract, the party terminating the contract forfeits the earnest money paid or, as the case may be, must return double the amount received.”

Following unilateral termination, the contract ends, but in certain cases, the terminating party may still incur obligations, such as the reimbursement of amounts received or the payment of damages, depending on the nature of the contract and the contractual provisions. In contracts requiring immediate performance, if the parties have established a price for exercising the right of termination, this must be paid at the time of termination, but no later than the moment the other party performs its obligation. In other words, if one party unilaterally terminates the contract but pays the termination price after the other party has already performed its obligation on time, the mechanism of termination can no longer be validly invoked.

The analysis of Article 1276 of the Civil Code reveals that it governs a specific situation, namely when one party is entitled to unilaterally terminate the contract based on a right expressly recognized by the other party.

It is essential to emphasize that the provisions of Article 1276 (1)–(3) are suppletive in nature, meaning that the parties may derogate from them by agreement. For example, they may stipulate that the right of termination may be exercised after performance has commenced, that it will have immediate effect even without payment of the termination price, or that it will affect obligations currently being performed.

Similarly, Article 1277 of the Civil Code (regarding contracts concluded for an indefinite period) provides that such contracts may be unilaterally terminated, provided a reasonable notice period is observed. Any contrary provision or clause stipulating a consideration in exchange for termination in such cases is deemed unwritten. Thus, in the case of indefinite-term contracts, the law recognizes a legal and gratuitous right of unilateral termination. Provisions prohibiting perpetual obligations are mandatory (Pop, Popa, Vidu, 2020: 130).

The Civil Code regulates legal termination for several types of contracts, including: sale with repurchase agreement (Art. 1758), lease (Art. 1816), residential lease agreements (Arts. 1824–1825), mandate (Art. 2030), commission (Art. 2051), consignment (Art. 2063), deposit (Art. 2115), and insurance (Art. 2209). In all these cases,

## **Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination**

termination must be carried out in good faith, and abusive exercise of the right is not permitted.

Regarding consumer contracts, regulated by Article 1177 of the Civil Code, the special rules of consumer protection legislation apply, supplemented by Civil Code provisions.

Accordingly, unilateral termination constitutes a flexible legal mechanism, recognized either by agreement or by law, with wide applicability in the field of civil contracts, including in consumer law.

Unilateral termination of a contract does not constitute a breach of the principle of the binding force of contracts, but rather an exception, expressly regulated by law or contractually agreed by the parties. While contracts are generally governed by the principle that they must be respected until full performance of the obligations undertaken, unilateral termination is not inconsistent with this principle and is considered an expression of contractual freedom.

It is important to stress that unilateral termination of a contract—regardless of its source, whether in law or contractual provisions—must be exercised in good faith, for well-justified reasons, and arbitrary, abusive, or damaging acts are excluded (Boilă, Luntraru, 2023: 88).

**The transport contract – an atypical contract that derogates from the principles governing the effects of civil legal acts.** Article 1955 of the Civil Code defines the transport contract as the agreement by which one party, called the carrier, undertakes, as a principal obligation, to transport a person or a good from one location to another, in return for a price which the passenger, sender, or consignee agrees to pay at the time and place agreed upon.

The definition provided by the Romanian Civil Code therefore refers to both passenger and goods transport contracts. Being a general definition encompassing both, it is, without doubt, of a broad nature, and the article in question refers only to the essential elements of a transport contract. Consequently, in order to rigorously reflect the actual legal structure of each type of transport contract, this article must be corroborated with the provisions of Sections II and III of the special regulation, which expressly govern the goods transport contract and the passenger and luggage transport contract, respectively. These provide a precise approach to the elements which, at a theoretical level, allow for a complete legal definition of each type of contract.

Hence, there are important structural and functional differences between the two types of contracts. A first element of differentiation lies in identifying the parties to each contract. In the case of passenger transport, the parties are the carrier and the passenger, which corresponds to a “classic” contractual structure—where the effects are limited to the parties and third parties. However, when analyzing the goods transport contract, this model no longer applies in the same way. In such contracts, the parties are *the sender* and *the carrier*. The beneficiary of the contract is the consignee, even though they do not take part in the conclusion of the contract. It is crucial not to confuse the contracting parties with the participants in a goods transport contract. The notion of participant is broader and includes both the contracting parties and the consignee, who is not formally a party to the transport contract but acquires rights and obligations under it, provided they adhere to the contract.

The transport contract is considered an exception to the principle of the relativity of the effects of legal acts (*res inter alios acta, aliis neque nocere, neque prodesse potest*),

and some authors equate it, in legal nature, with a stipulation for the benefit of a third party. The transport contract therefore appears as a contract concluded in favor of a third party, that is, a contract between the sender (as stipulator) and the carrier (as promisor), in favor of the consignee—the third-party beneficiary—who thereby acquires a direct right against the carrier.

From a structural standpoint, there are clear similarities between stipulations for the benefit of a third party and the transport contract (Cristoforeanu, 1925: 54; Scurtu, 2001: 28): the carrier's performance benefits the consignee entirely, just as in a stipulation for another; the consignee has a direct action against the carrier if the latter fails to fulfill the obligations undertaken toward the sender; and the sender, like a stipulator, retains a unilateral right to revoke the contract until the consignee adheres to it.

The third-party beneficiary's rights arise directly from the contract between the promisor and the stipulator; only the exercise of these rights depends on the will of the third-party beneficiary. A stipulation for another involves three types of legal relationships: between the stipulator and promisor, between the promisor and third-party beneficiary, and between the stipulator and third-party beneficiary. Emphasizing these relationships, as well as the legal position of the beneficiary and the legal nature of this type of contract, serves to highlight the symmetry between stipulations for another and the transport contract.

The comparative analysis of these two legal constructs—stipulations for another and the goods transport contract—has been carried out by legal scholars from various perspectives. Some authors consider the transport contract to be “a practical application of stipulation for another” (Gidro, 2017: 25–28).

Other scholars (Tiță-Nicolescu, 2012: 20) argue that, when there is no contract between the sender and the consignee, the transport contract constitutes a stipulation for the benefit of a third party, where the sender is the stipulator, the carrier is the promisor, and the consignee is the beneficiary of the stipulation. The specific element in this case lies in the fact that the sender's right to modify the transport contract is extinguished once the consignee expresses their will to exercise the rights arising under the transport contract, or as soon as the sender delivers the duplicate of the transport document to the consignee. From that moment onward, the right to modify the transport contract through further instructions transfers to the consignee.

Failure to fulfill the stipulation, meaning failure by the carrier to deliver the goods to the consignee (e.g., if the consignee cannot be located, refuses or neglects to receive the goods, or if there are disputes between multiple consignees regarding delivery, or for any other reason not attributable to the carrier), triggers a specific procedure in transport law: the carrier must immediately request instructions from the sender, who must provide them within 15 days, failing which the goods will either be returned to the sender at their expense or sold by the carrier. The carrier shall be compensated by the consignee or the sender, as appropriate, for damages caused by the consignee's delay in taking delivery of the transported goods (Romanian Civil Code, Article 1981).

Other scholars consider that it is necessary to assess whether, under the current regulation of the goods transport contract in the Civil Code, the contract still involves a stipulation for the benefit of a third party. The issue arises from the wording of Article 1977 of the Civil Code, which states that “the consignee acquires the rights and obligations arising from the transport contract by accepting the contract or the transported goods.”

Under the regulation of stipulation for another, the right of the third-party beneficiary arises directly from the stipulation, and their acceptance or rejection of this

## **Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination**

right constitutes merely the exercise of a potestative right that the beneficiary acquires together with the patrimonial right. In contrast, under the goods transport contract, the consignee must accept the contract or the transported goods, through which act of will they acquire both rights and obligations under the contract. Through this acceptance, the consignee becomes a party to the transport contract, which explains why they acquire not only rights, but also obligations. Thus, the consignee rather occupies the position of an adherent to the contract.

This view is also supported by Article 1974 of the Civil Code, which provides: “The sender’s right to modify the transport contract is extinguished as soon as the consignee has expressed the intention to exercise the rights arising under the transport contract pursuant to Article 1977 or as soon as the sender has handed over to the consignee the duplicate of the transport document. From that moment on, the right to modify the contract through further instructions is transferred to the consignee” (Stoica, 2020: 35).

Hence, there are also differences compared to a stipulation for another, namely that under a stipulation for another, the third-party beneficiary can only acquire rights, whereas under a transport contract, the consignee acquires both rights and obligations. There are similarities, but not identity, between the position of the third-party beneficiary in a stipulation for another and the position of the consignee in a transport contract. According to other opinions (Scurtu, 2001: 26–30), with which we concur, the consignee holds autonomous rights arising directly from the transport contract, and it is considered that the legal position of the consignee exhibits a distinct originality. Moreover, the consignee can be regarded as the holder of autonomous rights originating from the very transport contract itself (Căpăfină, 2000: 44).

Another distinguishing element in defining the two types of transport contracts—goods and passengers—is their purpose: in the case of a goods transport contract, the purpose is the delivery of the goods into the hands of the consignee, while in the passenger transport contract, the purpose is the passenger’s travel, that is, their arrival at the agreed destination. The obligation to transport persons includes not only the travel operation but also embarkation and disembarkation procedures.

The type of obligation also differs between the two contracts. In the case of goods transport, the obligation is one of result. As an exception, Article 1958 (2) of the Civil Code provides that a carrier who offers services to the public in the course of their professional activity free of charge is not subject to the rules governing the transport contract and is only bound by a duty of prudence and diligence. Regarding the type of obligation in passenger and baggage transport, the solutions differ: for baggage transport, the rule under Article 1958(2) applies, whereas for passenger transport, Article 2002(2) stipulates that the carrier is obliged to bring the passenger on time, unharmed, and safely to the destination. Thus, we are dealing with an obligation of result regardless of whether the transport is paid or gratuitous, and this obligation encompasses both the movement of passengers and a *safety obligation*, understood in the legal literature (Pop, Popa, Vidu, 2012: 33–34) as an obligation to bring passengers unharmed and safely to their destination.

Safety obligations are not expressly enshrined in legislation; they are regarded as a subcategory of obligations *to do*, contractual in most cases, and sometimes legal. They represent a contractual or statutory duty whereby one party must safeguard the other party—and even third parties—against risks that threaten their physical safety (Pop, Popa, Vidu, 2012: 33).

Hence, the passenger transport contract is a contract by which one party, called the carrier, undertakes, as a principal obligation, to transport the passenger/traveler on time, unharmed, and safely from one location to another agreed with the passenger, in return for a price that the passenger undertakes to pay, and to ensure suitable conditions for the safe embarkation and disembarkation of the passenger.

The goods transport contract is a contract by which one party, also called the carrier, undertakes, as a principal obligation, to transport a good from one place to another, in return for a price that the sender or consignee undertakes to pay, and to deliver the good at the time and place agreed upon.

As previously mentioned, under Article 1270 of the Civil Code, a contract validly concluded has the force of law between the contracting parties. The binding force of the contract derives from the “force of law” that the law itself confers upon the contract in the relations between the parties. From the recognition of the contract as the “law of the parties,” two fundamental rules follow: the irrevocability of contracts and the relativity of their effects.

The rule of irrevocability expresses the idea that *a contract may be modified or terminated only by mutual consent or for reasons authorized by law*. The Civil Code, however, derogates from this principle in the field of transport law by granting the sender the right to unilaterally renounce or modify the contract, provided they compensate the carrier for incurred expenses and direct, immediate damages resulting from compliance with their instructions. According to Articles 1970–1975 of the Civil Code, the sender has the right to suspend the transport, to request the return of the goods, to demand their delivery to a person other than the one specified in the transport document, or to dispose of them as they see fit—but is bound to pay the carrier the expenses and the value of any damages that directly result from this countermand.

Moreover, new developments in contract law, such as unilateral termination, have a direct explanatory role in understanding the legal nature of the countermand in transport contracts.

In conclusion, the transport contract—with its distinguishing elements based on whether it concerns goods or persons—is a legal construction that derogates from two fundamental principles governing the effects of civil legal acts. These exceptions may be summarized as follows: it derogates from the principle of relativity through the status of the consignee—akin to that of a third-party beneficiary under a stipulation for another; and, it derogates from the principle of irrevocability through the sender’s right of countermand—the unilateral right to amend or cancel the contract.

**The countermand in the goods transport contract.** From a historical perspective, the Commercial Code derogated from the principle established by Article 969(2) of the former Civil Code through the provisions of Article 421 of the Commercial Code, granting the sender the right to unilaterally renounce or amend the contract, provided that they compensated the carrier for the expenses incurred and the direct and immediate damages resulting from the execution of such instructions. This derogation was considered an exception in contract law, where the general rule was that a contract was concluded by mutual agreement—*mutuus consensus*—and could only be terminated by the mutual will of the parties—*mutuus dissensus*.

The current Civil Code also derogates from this principle in the field of transport law and grants the sender the right to renounce or modify the contract unilaterally, subject

## **Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination**

to the obligation to pay the carrier the expenses incurred and direct and immediate damages resulting from carrying out such instructions.

Accordingly, pursuant to Articles 1970–1975 of the Civil Code, the sender has the right to suspend the transport, to request the return of the transported goods, to demand their delivery to another person than the one indicated in the transport document, or to dispose of them otherwise as they see fit, but must pay the carrier the expenses and the value of the damages which are the direct consequence of the countermand.

Whereas under the former regulation, the sender's right to unilaterally modify or renounce the contract was viewed as an exception to contract law and had no basis in general civil law, the current regulation, under Article 1270 (2) of the Civil Code, provides that a contract may be amended or terminated only by agreement of the parties or for reasons authorized by law. Therefore, a contract may be terminated by the will of a single party, but only for legally authorized reasons. In light of current legislation, such modification is no longer viewed as a major exception, but rather as having the legal nature of a statutorily authorized cause (Baiaș, Chelaru, Constantinovici, Macovei, 2012: 1978).

The rationale for granting this right to the sender is both economic and legal: by recognizing this right, the sender's interests are better protected—for instance, they may wish to redirect the goods to a more favorable market, or to halt the shipment if the consignee has died or gone bankrupt before the goods arrive; moreover, if the goods have been transferred during transit, the buyer, who subrogates into the seller's rights, may have an interest in changing the destination of the goods (Scurtu, 2001: 78).

Under the previous regulation, there were two legal provisions—Articles 420 and 421 of the Commercial Code—that addressed the sender's right to unilaterally terminate the transport contract, including in cases where the transport was excessively delayed. The current regulation provides a more extensive legal framework through Articles 1970–1975 of the Civil Code, which more thoroughly address two key forms of unilateral modification: modification by countermand, and modification due to impediments to transport performance.

An inventory of the aspects regulated by the Civil Code in this section on the sender's right to dispose of the goods shows that the legislation, from a general theory perspective, is focused on the following issues: the sender's right, under Article 1970, to unilaterally modify or renounce the transport contract, a right further detailed and supplemented by Article 1973 under the notion of *subsequent disposal right* or *countermand right*; the right of disposal in the event of impediment to transport, regulated by Article 1971, and supplemented by Article 1972, which provides the remedies available to the carrier should the sender fail to exercise this right; matters regarding the holder of the countermand right, as regulated by Article 1974; and lastly, the carrier's right to refuse the countermand, governed by Article 1975, which sets out the circumstances under which the carrier may legally refuse to execute the countermand (Cotuțiu, 2015: 143–145).

*The countermand.* The legal act by which the sender unilaterally modifies or terminates the transport contract is called a countermand. In general theory (as regulated by the Romanian Civil Code), the content of the countermand right is determined, as previously mentioned, by the provisions of two articles of the Civil Code: Article 1970, which sets out what the sender may modify in general, and Article 1973, which further details these prerogatives through specific references to aspects that may be changed under the sender's right of subsequent disposition. According to Article 1970(1) of the Civil Code, the sender may suspend the transport and request the return of the goods or their delivery to a person other than the one mentioned in the transport document, or otherwise

dispose of them as they see fit. In accordance with Article 1973 (1), the sender's right of subsequent disposition grants them the following possibilities: to withdraw the goods before departure; to stop the goods during transport; to postpone delivery of the goods to the consignee; to order the return of the goods to the place of departure; to change the consignee; to change the destination; or to make another modification of the terms of transport performance. It may be said that Article 1970 functions as a general rule in the area of countermand, while Article 1973 serves as a special rule. The provisions of Article 1973 can be grouped, from a content perspective, into two categories: termination of the contract – the sender has the right “to withdraw the goods before departure, to stop them during transport, or to order their return to the place of origin”; modification of contractual execution terms – such as changing the consignee or destination – without altering the essential terms of the contract.

In this context, the sender is also subject to a prohibition: they may not issue a subsequent instruction that results in the division of the transport, unless otherwise provided by special legislation.

In line with this generalization principle, Article 1970 also stipulates that a sender issuing a countermand must pay the carrier the expenses and the value of damages which are the direct consequence of the countermand. Article 1973 (2) elaborates further: a sender who has issued a subsequent instruction must pay the carrier, depending on the modification made: the price for the completed portion of the transport; fees owed due to the execution of the subsequent instruction; expenses caused by implementing the subsequent instruction; compensation for any damage suffered as a result of executing the countermand.

The timing of the modification is left to the sender's discretion, but it is beyond dispute that the subsequent instruction must be issued after the conclusion of the contract (with the moment varying depending on the type of transport—whether consensual or real—both types being possible in transport law), and before the consignee adheres to the contract.

To exercise the countermand right, formal conditions are required: the sender must present the transport document signed by the carrier or a receipt of delivery, if such a document has been issued. The modifications resulting from the countermand must be recorded in the transport document or the receipt, under the carrier's new signature. While Article 1970 states that the countermand's modifications must be recorded in the transport document or receipt under the carrier's signature, Article 1973 specifies that the sender may issue “subsequent written instructions.” In fact, regarding form, the provisions of Article 1973 are meant to complement those of Article 1970, reinforcing the idea that the carrier must accept the new legal commitment in writing. However, given that the transport contract is generally consensual, Article 1973 also covers situations where no transport document or receipt was issued—a scenario theoretically possible under Article 1962 of the Civil Code, which addresses the form requirements of transport documents and allows such an exception.

When analyzing the form-related provisions—Articles 1962 and 1956 in the general rules on goods transport contracts, and Articles 1241–1243 in the Civil Code concerning contract formality—it is clear that contract modifications are subject to the same formal conditions required for the contract's conclusion, unless the law expressly requires the written form as a condition of validity. Thus, since the written form of the transport contract is required for evidentiary purposes, the formal conditions for

## **Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination**

modifying the transport contract are also required *ad probationem* (Baiaș, Chelaru, Constantinovici, Macovei, 2012: 1982–1983).

With respect to the holder of the right, the general rule is that the sender holds the right of subsequent disposition. By exception, this right may also belong to the consignee. According to Article 1974 of the Civil Code, the sender's right to modify the transport contract is extinguished as soon as the consignee expresses the intent to exercise the rights conferred by the transport contract or as soon as the sender delivers the duplicate of the transport document to the consignee.

From that moment, the right to modify the transport contract through subsequent instructions transfers to the consignee. The consignee acquires rights and obligations under the transport contract by: (i) accepting the contract, (ii) accepting the transported goods, and (iii) receiving the duplicate of the transport document from the sender.

Granting the sender the right to modify the contract creates for the carrier the obligation to comply with such modifications. Execution must occur under the conditions provided by Article 1970 of the Civil Code, and any failure by the carrier to perform this obligation—or performance under other conditions—results in liability for the damages caused by executing the countermand in violation of Article 1970.

The carrier may refuse to comply with a subsequent instruction in the following situations: if its execution would seriously disrupt the proper conduct of operations; if, in the case of a change in destination, the additional fees and expenses are not covered by the value of the goods or by other guarantees; if, at the time the instruction is received, execution is no longer possible. Additionally, the carrier is obliged to inform the sender or the consignee, as applicable, of the refusal to execute the countermand.

The focus of the current analysis lies in the legal nature of the countermand.

The first point to note is that the change introduced by the current Civil Code through Article 1270 aligns the legal situation created by the countermand with the principle of contract irrevocability, establishing that a contract may be terminated for causes authorized by law, even unilaterally by one party.

From a legal perspective, the countermand may be viewed as having the nature of unilateral termination, given that both represent flexible legal institutions that may be recognized either contractually or by law, as in the case of the countermand. The fact that the right to terminate may be exercised after the contract has been formed is another point of convergence. In general theory, the termination declaration is a unilateral legal act subject to notification (Terezea, 2024: 157), since it leads to the extinction of a legal relationship (Romanian Civil Code: Article 1326), and in the case of the countermand, the idea of written form and communication is promoted.

Despite these overlapping features, the countermand and unilateral termination also differ clearly: the countermand is a legal act whereby the sender may modify certain execution-related contractual terms or unilaterally terminate the transport contract, whereas unilateral termination—also known as a withdrawal or disengagement clause—aims solely at terminating the contract; the legal basis of the countermand lies in statutory provisions, not in mutual agreement, whereas unilateral termination is based on party agreement; the right of unilateral termination is potestative in nature, and the possibility of awarding damages must be assessed in light of its legal nature (Terezea, 2024: 158); by contrast, in the case of a countermand, the Civil Code and, where applicable, special laws expressly determine what the sender must grant the carrier to enforce the countermand; for unilateral termination, the parties may decide which of them holds the right, whereas in transport contracts, the sender is the holder by default, and after adherence to the

contract, the consignee. The carrier is not granted this right and can only make certain modifications in cases of transport impediment; they do not have the right to unilaterally terminate the contract.

*Contract modification in case of transport impediment.* Under the previous regulation, Article 420 of the Commercial Code addressed the situation where the sender could terminate the contract due to impediments to transport or delays caused by force majeure or fortuitous events, while Article 1971 of the Civil Code currently governs the impediment to the execution of transport, without limiting itself to force majeure and fortuitous events.

According to Article 420 of the Commercial Code, if transport was hindered or excessively delayed due to a fortuitous event or force majeure, the carrier was required to immediately notify the sender, who had the right to terminate the contract. In commercial law, such cases excluded the carrier's fault, and in doctrine, such transport was described as defective transport (Cotuțiu, 2015: 136).

The current regulation broadens the scope of transport impediments, including also situations attributable to the carrier.

According to the current Civil Code, two scenarios are possible: *relative impediment* to transport execution – when reaching the destination remains possible, but requires changing the initial route or timeline; *absolute impediment* – when there is no alternative route or, for other reasons, transport can no longer continue.

In the event of relative impediment, the carrier has the right to request instructions from the sender, and in the absence of a reply, to continue transport to the destination by altering the route, provided the impediment is not attributable to the carrier. In this case, the carrier is entitled to: the price of transport; associated fees and expenses for the actual route; and appropriate adjustment of the transport timeline.

Doctrine observes that, even though the route is not explicitly mentioned in the transport document under Article 1961 of the Civil Code, it is implicitly relevant since the price and duration of the transport—both mandatory details—are typically determined based on the route. The impediment to performance must be a serious one. Since the instruction clause is contractual, it is binding on the carrier and acts as the remedy for their inability to perform the essential obligation—transporting the goods. As noted in legal literature, “these instructions are a subsidiary contract through which the parties mutually revoke the initial contract, which has become impossible to perform, and establish a new framework for fulfilling the specific obligation” (Cotuțiu, 2015: 140–141).

In the case of absolute impediment, as outlined by legal provisions—where there is no alternative transport route, where transport cannot continue for other reasons, or where the instructions provided by the sender in the transport document for such a situation cannot be executed—the carrier must request instructions from the sender.

In this scenario, the Civil Code regulates only the case where the sender is notified of the impediment, granting them the possibility to terminate the contract. The carrier is entitled only to the expenses incurred and to the proportionate transport price corresponding to the completed route. Since the impediment is not attributable to the carrier, the sender is not entitled to damages.

In this context, the Civil Code uses the term termination, and the right-holder is the sender. Thus, the reference is to unilateral termination, and the terms countermand or right of subsequent disposition are not used.

From the perspective of effects, both the revocation of the contract by mutual consent and the unilateral termination granted by law to the sender in the event of an

## **Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination**

absolute impossibility of performance create the same legal outcome: termination of the contract for the future.

If the sender fails to respond to the carrier's notification, Article 1972 of the Civil Code applies, which establishes a procedure: if, within 5 days of receiving the notice, the sender neither provides executable instructions nor communicates termination of the contract, the carrier may: keep the goods in storage; deposit the goods with a third party; sell the goods, if storage is not possible, or if the goods may spoil or deteriorate, or if their value cannot cover the transport price, additional charges, and expenses. If the goods are sold, the proceeds—after deducting the carrier's financial claims—must be made available to the sender. If the proceeds are less than the carrier's claims, the sender must pay the difference.

In this final scenario, the carrier—as the debtor of the transport obligation—unilaterally modifies the transport contract by placing the goods in storage or selling them. The term "modification" is chosen by the Civil Code, which titles Article 1972 as Modifications Made by the Carrier.

Doctrine has criticized the terminology used in the Code, particularly the phrase to valorize the goods (Cotuțiu, 2015: 141–142), considering it non-legal and asserting that it refers in fact to the sale of the goods. Moreover, it is emphasized that this unilateral termination of a synallagmatic contract (bilateral contract) for the future by the carrier is distinct from the general unilateral termination of synallagmatic contracts (e.g., rescission or cancellation) due to breach of obligation, which belongs to the creditor who has performed their own obligations.

According to legal provisions, if the impediment ceases before the sender's instructions arrive, the goods are to be delivered to the destination without waiting for further instructions, and the sender must be promptly notified.

Moreover, Article 1557 (1) of the Civil Code regulates the definitive impossibility of performance. Thus, when the impossibility is total and definitive and concerns a significant contractual obligation, the contract is terminated by operation of law, provided the following conditions are met: a fortuitous event has made performance impossible; the impossibility is total and definitive; it occurred before the debtor was in default; the non-performance affects a material contractual obligation; and the obligation does not concern generic goods (Terezea, 2024: 397–400).

**Countermand in the Passenger Transport Contract.** As for the passenger's rights, the Civil Code expressly recognizes the passenger's right to unilaterally terminate the transport contract if, based on the circumstances, the delay in transport performance renders the contract useless for the passenger. In such a case, the passenger may terminate the contract and request a refund of the fare. To exercise this right, the following cumulative conditions must be met: improper performance of the transport contract (i.e., delay in execution); the delay renders the contract meaningless for the passenger.

Therefore, in this context, unilateral termination constitutes a ground for contract termination (Romanian Civil Code: Article 1321), falling under general contract theory and regulated by Article 1276 of the Civil Code, which states that the right to unilaterally terminate a contract may be exercised only by the party in whose favor it is granted and only if performance has not yet begun.

**Conclusions.** In transport law, the regulations are particularly numerous within the scope of special legislation, and as legal scholars have observed (Buciuman, 2021:

704), they currently create “a prime example of regulatory parallelism.” Such a situation—where an extensive body of special regulation exists (matched perhaps only by the domain of administrative offence law), alongside a general theory of the transport contract in the Civil Code, supplemented by the rules of common law (civil law serving as the *lex generalis* for transport law)—has the following effect for both practitioners and legal scholars: an overabundance of regulation does not simplify but rather increases the effort required to identify the appropriate legal solution and to explain the legal nature of institutions arising from the practice of transport activities.

The issues related to transport legislation arise on multiple levels: the transport contract is regulated in the Romanian Civil Code, but without corresponding amendments to the special rules in the field; the regulation of transport contracts is scattered across multiple sources—with distinct rules for each mode of transport (air, road, rail, maritime) and depending on the object of transport (persons or goods); the existence of international regulations governing various types of transport; the internal regulatory framework consists of a complex mix of public law norms (administrative, administrative offences, criminal law—doctrine has even discussed the need for a transport criminal law) and private law norms. These are just a few of the issues facing the legal framework of transport law, which have prompted legal scholars to call for a “detoxification” of transport legislation and for a harmonization and simplification process—a kind of “civilizing” of the legal regime applicable to transport contracts.

This discussion arises from the analysis of the countermand, which is, on the one hand, a specific institution of transport law (in the context of goods transport contracts), yet, in its regulation, we observe a dual approach: the legislation promotes both a special right and at the same time invokes an institution from general theory—namely, unilateral termination. A substantive analysis of the legal nature of the mechanisms that, in goods transport, lead to the termination or, where applicable, the modification of the transport contract in various situations requires an effort to identify how termination occurs and to determine the legal instrument used (countermand or unilateral termination under general theory), in order to understand the actual legal effects and to apply the appropriate legal norms.

If we extend this discussion to the special regimes governing each mode of transport (air, road, rail, maritime)—where the countermand is regulated in more nuanced terms than in the Romanian Civil Code—the issues become even more complex and may well constitute the subject of a separate analysis.

#### **Authors' Contributions:**

The authors contributed equally to this work.

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### Article Info

*Received:* May 08 2025

*Accepted:* May 25 2025

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#### How to cite this article:

Scarlat, D. I., Stanciu, C. (2025). Comparative analysis of unilateral termination and countermand – legal institutions with a role in contract termination. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 81 – 95.



## ORIGINAL PAPER

### Metaphor in Didactic Discourse

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

#### Abstract:

“If your daily life seems poor, do not blame it; blame yourself, tell yourself that you are not poet enough to call forth its riches; for to the creator there is no poverty and no poor indifferent place.” (Rainer Maria Rilke, *Letters to a Young Poet*, 2016)

Metaphors allow the reader to enter a fascinating world or multiple miraculous worlds developed in the spectacle of words.

Metaphor is the most frequent, most unpredictable and most expressive of figures of speech.

Metaphor is an artistic process by which an ordinary object is replaced with an unusual one, based on a real or imaginary correspondence.

Metaphor is the process by which a change in meaning is produced by substituting words, resulting in the introduction of a new, unforeseen element into the linguistic expression, based on similarity and abstraction, retaining from the multiple attributes of the term only one very particular one that dominates the others.

Metaphors usually create a similarity or analogy. Metaphors express reality in a way that is pleasing to the ear. Speaking in metaphors can lead in two ways, either to speak to please someone or to speak sarcastically.

Metaphor is not just a figure of speech studied in school, it is part of our everyday lives.

**Keywords:** *metaphor, terminology, didactic discourse, significance, communication.*

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## Metaphor in Didactic Discourse

### Introduction

Didactic discourse represents the totality of verbal, nonverbal and written interactions that take place between the educator and the students in the learning process. This type of discourse is essential in the educational environment, as it facilitates not only the transmission of information, but also the building of interpersonal relationships, the development of cognitive and emotional skills of students. In essence, didactic discourse is not limited to the simple communication of knowledge, but also incorporates pedagogical strategies adapted to the needs and particularities of the group of students.

This form of discourse is manifested through a variety of types of communication, which include oral presentations, discussions, explanations, questions and answers. Also, an important element of didactic discourse is feedback, which allows the educator to evaluate the students' understanding and adjust the pedagogical approaches according to their reactions and needs. Basically, an effective didactic discourse is based on the principle of interactivity, promoting a collaborative and participatory learning climate.

The definition of didactic discourse cannot be dissociated from the cultural and social context in which the educational act takes place. Thus, the way in which educators communicate and interact with students can vary significantly from one country to another, and may reflect specific characteristics of the local educational system.

Didactic discourse is a fundamental element of education, in which not only knowledge is transmitted, but also values, attitudes and skills necessary for building an informed and involved society. A deep understanding of this type of discourse is crucial for improving educational practices and adapting to the constantly changing needs of the education paradigm.

### Didactic discourse - connection of concepts

Although the notion of grammar was at the heart of the study of language until the 18th century, it was limited to the status of a component from the 19th century onwards. The term "linguistics" appeared in 1820. The name "grammar" is based on the Greek *gramma* (plural *grammata*), which means "letter(s)". What is a letter? A letter is the basic unit of a word. The assembly of letters gives a word (synthesis); the subdivision of a word gives letters (analysis). Therefore, the name "*grammar*" carries with it the notion of an analytical-synthetic movement. Linguistics, on the other hand, derives from the Latin *lingua*. What is a *language*? There are two answers to this question.

The first answer is socio-political. When the French government wanted to eradicate regional languages, it called them *patois* or *dialect* (i.e. "regional variety"). This was intended to disqualify them. This is because the term language has an identity connotation. We are talking about the native language or *mother tongue* (in Polish, the *father tongue* or *paternal language*, because it is the language of the homeland). Lacan invented the concept of *lalangue* (in one word), which emphasizes its uniqueness.

In his dialogues with Mitsou Ronat, Chomsky answers Ronat's question as follows: "It is said jokingly that a language is one that has an army and a navy". (Chomsky, 1977:196).

This sentence - which has been often used, sometimes attributed to others, and generally misunderstood - means that this concept of language is not a linguistic concept for Chomsky (who replaces it with the concepts of grammar and language in the mathematical sense), but a political concept. Chomsky goes on to say that "language problems are always related to problems of power". He could have added - of a "territory".

The second answer is technical. A language is a triplet < lexicon - grammatical instruments - grammatical rules >. The lexicon is the set of lexemes, that is, the lexical material used to designate. The lexicon can be extended: for example, “newspaper” can be used to designate a newspaper. These extensions are formed through various processes, and the underlying relationships may or may not be identifiable (a teacher can explain all this through didactic discourse). Grammatical tools are the terms used to link lexemes and/or groups already formed. Two distinct domains thus emerge: that of lexemes (autonomous, nouns and adjectives in particular, or non-autonomous, affixes), which form the basic signifying material; and that of grammatical terms (or “tools”, “instruments”, the terminology is not fixed) (autonomous, determiners, prepositions, conjunctions, or non-autonomous, inflections in particular), which allow the structuring of constructed and hierarchical ensembles. As we have just seen, these two domains have their autonomous units (nouns, prepositions, etc.) and their non-autonomous units (affixes, inflections). Then, there are the elements that lie between these two domains: verbs are both lexemes and grammatical instruments (they are significant and have a strong structuring power, and are only semi-autonomous, since they generally require the obligatory presence of an inflection); adverbs are divided into lexematic adverbs (“*difícil - difficult*”, for example), grammatical adverbs (“*très - very*”, for example) and mixed adverbs (“*încântat - delighted*” is lexematic in: *El rezolvă problema încântat - He solves the problem delighted.* and grammatical in: *încântat că a reușit - delighted that he succeeded*).

The notion of discourse immediately faces two difficulties. The first is the relationship between monologue and dialogue. The second is that of the co-presence of two terms, discourse and text. Didactic discourse has more to do with the linguist's questions and the genesis of linguistics than with the results of this discipline at a given time. Therefore, we would say that the genesis of linguistics, in the search for the right questions and the right ways of analysis, but also in the search for the right objects and the right way of naming them, is more important for didactic discourse than all the results obtained by one school or another. However, this requires two comments.

Discourse has its roots in history: “due to the need to make the communication of knowledge an efficient and systematic process and of the remarkable cultural values of each social group to its new members”. (Rosales, cf. in Sanz, 1991:47)

Didactic discourse can be carried out in a triple perspective:

1. Organizational perspective. It takes place between the organizational functions of teachers. Didactic discourse is carried out in an institutional context. Therefore, it is necessary to carry out an analysis of the dimensions that compose it (space, time, relationships and structure), in order to try the different modalities within each dimension that best suit the communication process. An example of didactic discourse from an organizational perspective would be when the managers of an educational institution have periodic meetings with teachers.

2. Interpersonal perspective. It takes place when teachers communicate with students through their different teaching functions when planning, developing and evaluating the different curricular components of the teaching/learning process. It also takes place when communication takes place at the interpersonal level when teachers communicate with students' parents and when students communicate with them and their classmates. Communication between equal individuals is called horizontal communication, and the cooperative methodology is based on this. In fact, according to Professor Rosales (2001), horizontal communication occurs in the teaching process, as the differences between students and teachers, between students and students are reduced.

## **Metaphor in Didactic Discourse**

From the perspective of teachers, this vision of didactic discourse implies: on the one hand, to cooperate in the planning, contents, activities, teaching methodology and the implementation of evaluation; on the other hand, to try to implement cooperative learning. From the perspective of learners, this methodology positively influences their intellectual and socio-effective preparation. This means learning how to learn and learn from others, while providing opportunities such as the development of knowledge and values, camaraderie, solidarity, responsibility and friendship.

3. Intrapersonal Perspective. It is the psychological dimension of didactic discourse and its key point.

Didactic discourse will not achieve its objectives in the absence of this perspective.

The ultimate goal of didactic discourse is to promote and favor dialogue with students. This is essential to develop cognitive and metacognitive skills and abilities.

This level of discourse involves a deliberative process with ourselves. However, the deliberative process of others will never be left aside, especially those who strongly influence us in our decision-making process.

This perspective of didactic discourse is essential, because through it we can direct learning towards a professional purpose.

The educational environment plays an important role in the development of didactic discourse. According to Anderson (Medina, 1988:66), the environment is characterized by the following dimensions: ecology, built on physical and material aspects; social system, formed by the set of relationships established between its members; culture, as a synthesis of beliefs, values, affective and cognitive structures and ways of interpreting each person's reality.

According to Moss (Medina, 1988:68), each class or group represents a singular synthesis of the interactive effects of the components that create the environment conducive to an educational discourse.

The Russian psychologist Vygotsky (Vygotsky, 1977:56) decides that "didactic discourse should be oriented towards the future, not towards the past of the child's development, because learning is valid only when it precedes development, as it initiates a whole range of mature functions that are in the development of the next zone".

Supporters of Vygotsky's theoretical foundations (Leontiev, Galjperin, Zaporozhnek, Repkina, Eljkonjin, Davidov, etc.) have proven in their research that didactic discourse significantly changed in relation to the existing one (especially in the content area) positively affects the overall success in the classroom, but also each student/pupil separately, in the field of thinking, as well as qualitative and quantitative knowledge. In order to create new cognitive skills in children, various conditions must be met. First of all, the child should actively participate in the learning process and establish interaction with the adult who supports the discourse.

### **Metaphor in didactic discourse**

Metaphor in didactic discourse is an essential rhetorical tool that helps facilitate the understanding of complex concepts by associating them with more familiar images or ideas. Here are some important aspects of the use of metaphor in education: complex. Here are some ways in which metaphors contribute to this process:

1. Associating with Familiar Experiences: Metaphors allow teachers to associate new concepts with experiences or objects.

**Clarifying Concepts:** Metaphors can transform abstract ideas into concrete images, making them more accessible to students. For example, comparing the learning process to a journey can help students understand that learning is a journey, not just a destination. Clarifying concepts through metaphor in didactic discourse is an effective strategy that helps simplify and understand ideas that students already know. For example, describing the structure of the atom as a “small planet orbiting a sun” helps students visualize and better understand atomic structure.

*Reducing Ambiguity:* By using metaphors, teachers can reduce the ambiguity and confusion associated with technical or abstract terms. For example, explaining the concept of “energy flow” through the metaphor of a “flowing river” can make the idea clearer and easier to understand.

**Improving Conceptual Understanding:** Metaphors can help students develop a deeper understanding of concepts by exploring the relationships between different ideas. For example, comparing the learning process to “planting a seed” suggests that learning takes time and care to develop.

*Facilitating Memory:* Metaphors create mental images that can be more easily remembered than abstract information. For example, describing a chemical reaction as “a dance between molecules” can help students remember chemical interactions.

**Stimulating Critical Thinking:** Metaphors can challenge students to think critically and analyze concepts from different perspectives. For example, the question “What else could an iceberg represent in the context of environmental issues?” can encourage deep discussions and reflections on the topic.

2. *Stimulating Imagination:* The use of metaphors can stimulate students’ creativity and imagination. They can encourage them to think critically and make connections between different areas of knowledge.

Stimulating the imagination through metaphors in teaching discourse is a valuable technique that can transform the learning process into an engaging and creative experience. Here are some ways in which metaphors contribute to stimulating students’ imagination:

*Creating Vivid Images:* Metaphors help paint powerful mental images that can capture students’ attention. For example, describing an ecosystem as “an orchestra in which each species plays an instrument” can help students visualize the interconnections between organisms in an environment.

*Challenging Creative Thinking:* Metaphors can encourage students to think beyond conventional boundaries. For example, asking the question “If we could travel inside an atom, what would we see?” can stimulate imagination and lead to the exploration of scientific concepts in an innovative way.

*Facilitating Emotional Connections:* Metaphors can evoke emotions and help students connect personally with the learning material. For example, comparing the learning process to “an adventure full of discoveries” can make students feel more engaged and motivated to explore the subject.

*Enriching the Learning Experience:* Metaphors can transform lessons into engaging stories. For example, presenting history as “a journey through time” can make historical events seem more relevant and interesting to students.

*Encouraging Exploration of Abstract Concepts:* Metaphors can help students understand abstract concepts by making analogies with concrete situations or objects. For example, describing emotions as “waves that come and go” can help students understand the fluctuating nature of feelings.

## Metaphor in Didactic Discourse

*Stimulating Discussion and Collaboration:* Metaphors can open doors for creative and collaborative discussions among students. For example, using a metaphor to describe a complex concept can provoke new questions and ideas, encouraging students to collaborate in exploring the topic.

3. *Improving Information Retention:* Metaphors can help to remember information by associating it with strong mental images. For example, a metaphor that describes a scientific concept through a story can make the information easier to remember.

Improving information retention by using metaphors in didactic discourse is an effective strategy that helps students better remember abstract concepts and ideas. Here are some ways in which metaphors contribute to this process:

*Creating Memorable Associations:* Metaphors create connections between new information and existing experiences or knowledge. For example, comparing the structure of a cell to a “factory” that produces different “products” (proteins, energy, etc.) helps students retain the functions of different cellular organelles through concrete images.

*Enriching Mental Imagery:* Metaphors form strong mental images that facilitate the memorization process. For example, describing the concept of “water cycles” through the metaphor of a “dance of splashes” provides a visual image that can be more easily remembered than technical explanations.

*Simplifying Complex Information:* Metaphors can transform complex concepts into simple, easy-to-remember images. For example, explaining the process of photosynthesis through the analogy of a “recipe” in which plants “cook” food from the sun, water, and carbon dioxide makes it easier to understand and remember this biological process.

*Generating Emotions:* Metaphors can provoke emotional reactions that help consolidate memory. For example, describing climate change as a “planet-consuming fire” can generate a strong reaction, making the information more memorable.

*Stimulating Interest and Curiosity:* Using interesting and provocative metaphors can fuel students’ curiosity, making them more likely to retain the information presented. For example, the analogy that compares history to a “puzzle box” can make students more attentive and engaged in discovering the missing pieces.

*Reinforcing Concepts through Repetition:* Metaphors can be used repetitively to reinforce concepts throughout lessons. For example, consistently using a metaphor such as “a path to knowledge” throughout a course can help students retain that concept long-term.

4. *Facilitating Discussions:* Metaphors can open doors for deeper discussions and critical analysis. They can challenge students to explore deeper meanings and implications of the topic being studied.

Facilitating discussions through metaphors in teaching discourse is an effective method that encourages interaction and critical thinking among students. Here are some ways in which metaphors help stimulate discussions:

*Provoking Questions:* Metaphors can spark curiosity and generate interesting questions. For example, using a metaphor such as “society as a living organism” can challenge students to discuss the roles of different social groups and the interactions between them.

*Opening Diverse Perspectives:* Metaphors can provide a framework for exploring different perspectives on a topic. For example, comparing education to “a garden that

needs tending” can lead to discussions about teaching methods and the importance of support in the learning process.

*Stimulating Critical Thinking:* Metaphors can encourage students to analyze and criticize the concepts presented. For example, the question “What else could an iceberg represent in the context of environmental issues?” can provoke deep discussions about the visibility and hiddenness of environmental problems.

*Facilitating Collaboration:* Metaphors can create common ground for discussion, encouraging collaboration among students. For example, using a metaphor such as “a puzzle that needs to be solved” can encourage students to work together to find solutions to the problems being discussed.

*Improving Communication:* Metaphors can help clarify ideas and facilitate communication between students. For example, describing an international conflict as “a storm in which every country has a role” can help students understand the complexity of international relations and communicate more effectively about the topic.

*Creating a Safe Space for Discussion:* Metaphors can help create an open and safe learning environment in which students feel comfortable expressing their opinions. For example, comparing a lesson to “a journey where everyone has a guide” can encourage students to actively participate and share ideas.

*5. Create Emotional Connections:* Metaphors can evoke emotions and help create a connection between students and the learning material. This can make the learning process more enjoyable and engaging.

Emotional connections through metaphors in teaching discourse play a key role in creating a deeper and more meaningful learning experience. Here are some ways that metaphors help develop these emotional connections:

*Evoke Emotions:* Metaphors can stir up strong emotions that help students connect personally with the learning material. For example, describing a learning journey as “an adventure full of challenges and discoveries” can inspire excitement and curiosity.

*Facilitate Empathy:* The use of metaphors can help students understand the perspectives of others and develop empathy. For example, comparing suffering to “a shadow that follows us” can help students recognize and understand the difficulties their peers are facing.

*Making Personal Connections:* Metaphors can help students connect their personal experiences to the concepts being discussed. For example, describing the learning process as “a garden that needs tending” can encourage students to reflect on their own efforts and progress.

*Enhancing Motivation:* Metaphors can boost student motivation by creating an inspiring vision. For example, comparing education to “a key that opens doors to the future” can motivate students to seize their learning opportunities.

*Facilitating Reflection:* Metaphors can encourage students to reflect on their own emotions and experiences. For example, asking “How does your heart feel when you learn something new?” can challenge students to explore and express emotions associated with the learning process.

*Creating a Safe Space:* The use of metaphors can help create a learning environment in which students feel comfortable expressing their emotions. For example, describing a lesson as “a journey in which everyone has an important role” can encourage active participation and emotional openness.

Metaphor is essential in both a teacher’s speech and a student’s response. Metaphor gives meaning, gives color, sheds light where there are potential

## Metaphor in Didactic Discourse

misunderstandings. With the help of metaphor, the teacher can respond to the curiosities of students, stimulate both their feelings and their creative imagination. Metaphor can clarify knowledge but also future vision on concepts and theories. With the help of metaphor, teachers help students make connections, distinguish theory from practice, and bring new ideas. Metaphor does not appear by chance, it appears out of necessity and brings support and help in case of difficulties in perception.

### Conclusions

In conclusion, the use of metaphors in didactic discourse facilitates emotional connections by evoking emotions, developing empathy, and creating personal bonds. This approach not only enhances the learning experience, but also contributes to the formation of a more united and responsible learning community. Metaphor is a valuable tool in didactic discourse, having the ability to transform learning into a more accessible, creative, and memorable process. Its effective use can significantly improve the educational experience of students.

Didactic discourse is not a simple transfer of information, but an interactive process in which teachers and students co-construct knowledge. It involves the use of communication strategies that facilitate the active involvement of students, exploring the connection between pragmatics and consciousness, suggesting that effective didactic discourse not only transmits knowledge, but also develops students' critical consciousness. Didactic discourse involves encouraging critical thinking and reflection on one's own learning and experiences.

We have drawn a valuable perspective on how communication in education can influence the learning process. By understanding and applying pragmatic principles, educators can create a more effective and engaging learning environment for students.

In conclusion, pragmatics and didactic discourse are interdependent, and understanding pragmatic principles can significantly improve the effectiveness of communication in education.

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The authors contributed equally to this work.

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### Article Info

*Received:* March 15 2025

*Accepted:* May 23 2025

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### How to cite this article:

Chirițescu, I. M., Păunescu, F. A. (2025). Some considerations on the basic principles of the European Integration Process. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 96 – 103.



## ORIGINAL PAPER

# How micro-agenda setters acted in the 2024 Romanian presidential election campaign

Adina-Loredana Dogaru<sup>1)</sup>

### Abstract:

Social media era has transformed the agenda-setting process by altering the dynamic relationships among the public agenda, media agenda, and political agenda. Social media platforms enable quick access to social or political information, generating citizen participation (Gil de Zúñiga, Jung, & Valenzuela, 2012). Many studies have focused on the effectiveness of online communication between the political actors and the public, online political participation (Boulianne, 2009, 2015; Bode, 2012; Gil de Zúñiga, Jung and Valenzuela, 2012; Gil de Zúñiga, H., Weeks, B., & Ardèvol-Abreu, A., 2017; Dimitrova, Matthes, 2018; Wojcik, 2005 et al.), controversies related to online political participation (Flichy, 2008; Lee, Hosanagar & Nair, 2014; Morozov, 2011; Wojcik, 2005, 2011) and the investigation of agenda setting (McCombs and Shaw, 1972). The present research is based on the premise that agenda setting as a political process is influenced by social media communication and online participation in political activity influences the media agenda, public agenda and political communication, relating and interconnecting. As we will see next, social networks have the potential to generate the re-examination of the political agenda or become arenas of political mobilization among groups that are traditionally left out of the debate or less visible (Segaard, 2015; Dogaru-Tulică, 2019). How did the Romanian online environment manage to change the public agenda at a time of great social and political pressure? is one of the key questions that the present study seeks to address, building on the concept of micro-agenda setters—an extension of agenda-setting theory that explores how individual actors or small groups shape public perceptions on issues of interest (Casero-Ripollés, 2020). Using the qualitative focus-group research method, this paper shows that micro agenda setters play a crucial role in the formation of opinions in contexts such as election campaigns, influencing the main topics of discussion of online communities.

**Keywords:** *online political participation, agenda setting, social media, political communication, micro-agenda setters, presidential campaign.*

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## **How micro-agenda setters acted in the 2024 Romanian presidential election campaign**

### **Introduction**

In the context of contemporary digital transformation, electoral campaigns have transcended their traditional boundaries. No longer confined to televised debates or physical rallies, political communication is increasingly taking place in digital arenas, where social media platforms function as pivotal arenas of influence. Social networks provide fertile ground for political communication, implicitly for shaping voter behavior.

Within this explosive media evolution, micro-agenda setters are becoming a player in shaping perceptions and voting intentions, micro-agenda setters - influencers with varying numbers of followers, but strategically involved - have emerged as actors interested in shaping public discourse and voters' priorities, concerned with reorienting public attention and redefining the importance of specific issues.

Political communication, as the dynamic core of democratic systems, is undergoing a paradigm shift characterized by three interconnected transformations: the exponential growth of the volume of information, the continuously evolving quality of content dissemination, and the restructuring of social relations from hierarchical to network-based systems. As Roventa-Frumusani (2012, p.141) aptly observes, the system is marked by: “the quantity of information (communicational opulence, communication ecstasy), the quality of content (...), the restructuring of social relations – hierarchical, pyramidal organization replaced by reticular organization”. (...) These changes “decisively influence political communication: the explosion of information leads to *shared knowledge*, (...) re-problematizes the distance between the masses and the elites, the autonomy of members of social networks implies a reexamination of the decision”.

The 2024 Romanian presidential campaign is an emblematic case for understanding this transition, illustrating the extent to which digital platforms – and the actors operating within them – can redefine political influence. Beyond official campaign materials and traditional media coverage, a decentralized and often subtle form of influence has taken shape through micro-agenda setters. They do not necessarily operate within party structures, but in a hybrid space of media communication, acting as agents of contextualization, reframing, and prioritization of electoral themes. This evolution is leading to a reassessment of agenda setting theory in its classical form and invites further investigation into how influence operates in user-driven, but algorithmically mediated environments.

The 2024 Romanian presidential elections represented a watershed moment, highlighting the rise of micro-agenda setters as vectors of prioritization of political issues in the digital space.

### **Public agenda setting, political communication and social media**

Agenda setting is a continuous competition among issue proponents for the attention of media professionals, the public, and political elites. Agenda setting provides an explanation for why information about certain issues and not others is available to the public in a democracy, how public opinion is formed and why certain issues are addressed through policy actions.

“The study of agenda-setting is the study of social change and social stability” (Dearing & Rogers, 1996, pp. 5-6).

“The simultaneity of the political act (decision-making) and its mediatization reinforces the similarities between media discourse/political communication: legitimacy of the ephemeral - media purpose, prominence of specific stories, *hic et nunc* (here and now)

decision, generalized intertextuality (Rovența-Frumușani, 2012, p.142). “The pressure of mediatization of political life primarily involves determining the agenda according to the barometer of public opinion and disseminating it within the framework of an accessible, seductive, memorable discourse. (idem, p.143).

The concept of 'agenda setting' belongs to McCombs and Shaw (1972). Their study revealed a strong correlation between the media agenda and the public agenda, with topics such as foreign policy, law and order, and fiscal policy appearing in similar order on both. McCombs and Shaw 202(1972) argued that the media significantly influence the public agenda, not by dictating opinions, but by determining which topics receive attention. They emphasize that through their choices in news selection and presentation, editors, journalists, and broadcasters actively contribute to the construction of political reality (p. 176).

### **The evolution of agenda setting theory**

Walter Lippmann (1922) argues that the media are intermediaries, influencing individuals' perceptions and interpretation on the events occurring in the world. Bernard Cohen (1963) later highlighted that while the press may not often influence the specific opinions people hold, it is highly effective in directing public attention toward particular issues. Kurt and Gladys Lang, in their classic study "The Mass Media and the Shaping of Collective Behavior" (1966) emphasized the way in which the media participate in the "selection and presentation" of social and political events, giving them a symbolic status in the collective consciousness. The media direct attention to certain things, build the public image of politicians and constantly send messages to the individual, suggesting what to think about, what to know, and what to feel and experience. They argued that what the public perceives as “public reality” is largely mediated and reconfigured by the media. They observed that media coverage of events—such as presidential inaugurations or protests—does not merely reflect reality but reconstructs it, thus influencing public perception and collective behavior.

Lang and Lang thus introduced the idea that the media not only transmit information but also actively contribute to defining public priorities: “The media force attention on certain issues. They build public images of political figures.”—an idea that would later be systematically formulated under the name “agenda setting” (Lang & Lang, 1966, p. 468).

It should be emphasized that “the press, intentionally or unintentionally, structures the topics of interest and public debate. A working group always has an agenda, a list of topics to be debated in descending order of importance. Normally, topics that are not on the agenda are not debated. The “agenda” model shows how the press and especially the news [...] have the power to focus public attention on a limited list of topics, while ignoring others. As a result, some topics are insistently debated in the public space, and others are ignored” (Tim O’Sullivan, 1994, p. 8).

This formulation summarizes the essence of the theory: media influence is indirect but powerful, through prioritizing certain issues and marginalizing others. The concept of agenda setting has traditionally been associated with media institutions shaping public discourse by determining the importance of issues.

Dearing and Rogers (1988, 1996) explore the progression of social issues through three interconnected agendas:

**Media agenda:** the selection and prominence of issues presented by the media.

**Public agenda:** the issues that the public perceives as important.

## How micro-agenda setters acted in the 2024 Romanian presidential election campaign

**Policy agenda:** the issues that policymakers prioritize.

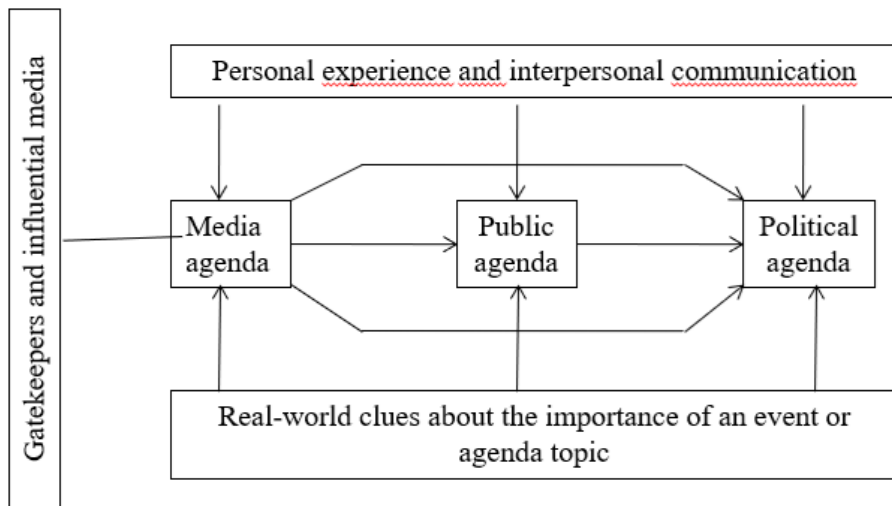


Chart no. 1: Elements of the agenda-setting process (Rogers, Dearing, 1988, pp. 555 - 594)

Agenda building is another concept that emerges and describes the process through which the agendas of political elites are shaped the media agenda and also the citizens' agenda (Barbaros, 2016).

### Agenda setting and its transformations in the digital environment

Dutta-Bergman (2004) emphasizes the evolving role of the internet and new media in the agenda-setting process. She highlights the internet's growing significance as a tool for shaping public opinion, particularly in relation to political agendas. The internet introduces an additional dimension to traditional agenda-setting by facilitating direct interaction among the media, public, and political actors. This enhances the influence of new media in determining the salience of issues. This framework aligns with the concepts of personal agendas and algorithmic filtering, in which individuals curate their media consumption based on their preferences and choices. Social media platforms such as Twitter (X), Facebook, and Instagram have further transformed the media landscape by empowering users to influence the prominence of issues (Meraz, 2011). Contemporary research underscores social media's growing impact on the broader media agenda (Vargo et al., 2018). Users on platforms such as Twitter and TikTok occasionally reverse the traditional flow of agenda influence (p. 303). This dynamic was evident during the 2024 Romanian election campaign, when conventional media outlets adopted and amplified viral topics that originated on social media.

Furthermore, hashtag activism and viral content demonstrate a bottom-up approach to agenda-setting, in which public discourse shapes mainstream news coverage. "The use of social media for informational purposes is positively associated with political

participation, especially among individuals with lower levels of political interest.” (Valenzuela et al., 2017, p. 28).

There are two new variables of agenda setting theory, related to the use of the online environment: *intermedia agenda setting* and *reverse agenda setting* with the so-called micro-agenda setters.

**Intermedia Agenda** refers to the way in which media influence the agenda of other media institutions, not just the public. The concept was developed in the context in which journalists, editors and media institutions monitor each other’s content and influence each other in setting thematic priorities.

*Intermedia agenda setting* examines how different media sources influence each other’s coverage. “Intermedia agenda setting is the process by which elite or prestigious media influence what other media consider newsworthy.” (Harder, Sevenans & Van Aelst, 2017, p. 1872). Research has shown that social media can set the agenda for traditional news outlets, especially during political events and crises (Neuman et al., 2014). This dynamic interaction highlights the reciprocal nature of agenda setting in the contemporary media environment.

The 2024 Romanian presidential election campaign provides a clear illustration of intermedia agenda-setting, as key subjects (text, photos, videos) from platforms like TikTok, Facebook or Instagram such as nationalism and corruption inside traditional parties, were promoted and amplified by traditional media, reflecting the dynamics described by Harder et al. (2017). Some viral posts from social media (TikTok, Facebook) were taken up by traditional media, illustrating how IAS also works in the online → offline direction. Viral statements by candidates on TikTok can become breaking news on TV or in the mainstream press.

Neuman et al. (2014) present a contemporary, comprehensive perspective on agenda setting in the digital era, explaining how agenda-setting, framing, and priming function within today’s highly fragmented media landscape dominated by digital platforms. The article “*The Dynamics of Public Attention: Agenda-Setting Theory Meets Big Data*” published in the Journal of Communication proposes an advanced analysis of how: “In the digital age, public agendas are shaped by a multitude of sources - traditional media, social networks, algorithms, and interpersonal communication.” (Neuman et al., 2014, p. 200). Agenda-setting is more diffuse and competitive than ever, the public consumes information through multiple channels and builds their personal agendas.

In the Romanian 2024 presidential campaign, this is reflected in the simultaneous coexistence and influence of official sources, candidates’ personal channels and participatory platforms such as TikTok or YouTube. Candidates communicated simultaneously through television, Facebook, YouTube, TikTok, official websites, podcasts, etc. Voters shaped their opinions through a diverse mix of information, where framing and priming originated from multiple sources. Rather than being dictated by centralized outlets like television or newspapers, the public agenda emerged from decentralized networks and was heavily influenced by social media algorithms.

## How micro-agenda setters acted in the 2024 Romanian presidential election campaign

Comparative Table 1: Classical model vs. Digital model (Neuman et al., 2014)

<i>Characteristic</i>	<i>Classical Model (McCombs &amp; Shaw, 1972)</i>	<i>Digital Model (Neuman et al., 2014)</i>
<i>Flow of influence</i>	Mass media → Public	Public ↔ Mass-media ↔ Social media ↔ Algorithms ↔ Influencers
<i>Number of main sources</i>	Limited (TV, Newspapers, Radio)	Multiple and Decentralized
<i>Control over the agenda</i>	Editors and Journalists	Distributed: public, algorithms, media, elites, platforms
<i>Feedback from the public</i>	Slow, indirect	Immediate, visible (comments, reactions, viralization)
<i>Analysis tools</i>	Opinion polls, interviews	Big Data, network analytics, content mining
<i>Typical example</i>	TV campaigns determine what topics the audience is discussing	Viral on TikTok determines what appears in the news

**Reverse agenda setting** challenges the traditional media-centric approach by highlighting how audiences can shape media content. “Reverse agenda setting occurs when public discourse – particularly through social media – affects what the media choose to convey.” (Meraz, 2011; Vargo et al., 2018).

Kiousis (2002) has highlighted that public engagement, particularly through digital platforms, can shift the focus of media coverage, making issues debated by the public more salient. “The salience of an issue is mediated not only by exposure but also by the credibility attributed to the media source.” (Kiousis, 2002, p. 370). The author’s research is essential in the conceptual development of agenda setting theory, as it introduces the idea of media source credibility and explores the link between media agenda and audience perceptions, especially in the emerging digital context.

Social media platforms such as Twitter and Facebook have been identified as significant facilitators of this phenomenon, allowing issues to gain prominence through public discourse before being adopted by mainstream media (Boulianne, 2015). Several studies have provided empirical support for the reverse agenda setting effect. Chadwick and Dennis (2019) examined how social media influenced traditional media during the COVID-19 pandemic, demonstrating that online discussions about public health measures led to significant shifts in mainstream media narratives. Bruns (2018) argued that the “gatewatching” model, in which social media users organize and amplify content, plays a crucial role in setting the public agenda. Unlike traditional “gatekeeping,” in which journalists control the flow of information, gatewatching allows the collective engagement of citizens to dictate the salience of news.

The phenomenon of reverse agenda setting, defined as the influence of public discourse on the media agenda (Meraz, 2011), was visible in the campaign for the Romanian presidential elections in 2024, where viral posts on TikTok and the reactions of online communities led the press to take up topics initially absent from the official discourse. The public becomes an active actor in shaping the mediatized political

discourse: a viral video on TikTok with a controversial statement by a candidate is later taken up by television and newspapers, the public's reactions to a sensitive topic (e.g. special pensions, sex education) become media pressure, forcing the media to address them.

Comparative Table 2: Difference from intermedia agenda setting

<i>Type of influence</i>	<i>Classic direction</i>	<i>Reverse direction</i>
Agenda setting	Media → Public	
Reverse agenda setting		Public (social media) → Media
Intermediate agenda setting	Media A → Media B	

### **Micro-agenda setters: decentralized and specific influence**

Micro agenda setters are a concept from media agenda theory, adapted to the context of social networks, that describes how the networks on social platforms (Facebook, Instagram, Twitter) influence young people's exposure and attitudes towards news and actuality. Micro-agenda setters are individuals or small groups from social media who influence what issues are discussed and prioritized among their online community. These networks function as "micro-agenda setters" in that individuals in a user's network can determine which topics become important to them, thus influencing their personal information and opinion agenda. The traits of these individuals can lead to negative outcomes, such as echo chambers and spirals of silence, but they can also produce positive effects by introducing new viewpoints and raising awareness of issues overlooked by traditional media (Wohn & Bowe, 2016).

Earlier research predominantly examined the influence of media institutions in agenda-setting processes; however, contemporary studies have shifted focus toward the role of individuals operating within decentralized digital platforms. The proliferation of digital media has facilitated the emergence of "micro-agenda setters," defined as individuals or small collectives who actively shape public discourse via social media and other online channels. Social media platforms empower these actors to elevate specific issues and narratives, thereby influencing broader conversations (Weeks et al., 2019). Figures such as influencers, activists, and citizen journalists have become increasingly significant in framing discourse by introducing nuanced perspectives and disseminating information that traditional media often subsequently incorporate (Meraz, 2011). Empirical evidence suggests that micro-agenda setters can affect mainstream media coverage, particularly during periods of political turmoil and social mobilization (Valenzuela et al., 2017).

This phenomenon challenges the conventional gatekeeping role traditionally held by media organizations, operating within an expanded agenda-setting framework characterized by reciprocal influences between legacy and digital media (Harder et al., 2017; Guo & Vargo, 2020). Journalistic practices have adapted accordingly, with professionals increasingly monitoring social media trends to guide editorial decisions (Neuman et al., 2014). Furthermore, the rise of digital activism, exemplified by movements such as #MeToo and Black Lives Matter, underscores the capacity of micro-agenda setters to shape media narratives and elevate public awareness (Tufekci, 2017).

## **How micro-agenda setters acted in the 2024 Romanian presidential election campaign**

Concurrently, these actors exert considerable influence on the dissemination and public perception of issues related to austerity and governance. Turcan (2014) highlights that media-driven debates on austerity have disrupted the political landscape, contributing to the formation of dominant parliamentary majorities and the ascent of populist parties (p. 44). The dramatization of government decisions was also unprecedented and contributed to the social absorption of political figures in the media.” A decade later, social media communication exacerbated the imbalance of the political environment.

The concept of micro-agenda setters describes actors with moderate audiences, but with contextual authority and the ability to influence political discourse in small but intensely engaged digital communities. They can be content creators, activists, independent journalists or influencers with specific social networks. In agreement with Dutta-Bergman (2004), voters do not passively consume political information, but prefer sources that validate their values and identity. Thus, micro-agenda setters function as vectors of trust and thematic filtering. Kiouisis (2002) adds that the perceived credibility of the source is a key factor in establishing salience – which gives these marginal actors disproportionate influence in the digital space.

### **Limitations of the use of micro-agenda setters in political communication**

I conclude by specifying some challenges that arise from the excessive use of micro-agenda setters:

- The large amount of user-generated content can lead to information fragmentation and selective exposure (Bennett & Segerberg, 2012).
- Despite their influence, micro-agenda setters face challenges such as information credibility, selective exposure, and disinformation (Bennett & Segerberg, 2012). The spread of false information from non-traditional sources raises concerns about the reliability of agenda setting in the digital age (Tandoc et al., 2018).
- In the current context of the accelerated expansion of digital media and social networks, disinformation has become, at least at a perceptual level, one of the main sources of public concern. Studies show that a significant percentage – 85% of European citizens – perceive the spread of inaccurate or completely false information as a serious problem for their own society. (Oprea, B., 2021, p.71).
- The theory of micro-agenda setters in social media conflicts with the theory of echo chambers. According to Garimella et alii. (2018), a separate discussion related to political discourse in social media concerns the so-called “echo chambers”, meaning that citizens are becoming increasingly polarized regarding political issues, they do not also hear the arguments of the opposing side, but are rather surrounded by people and news sources that only express opinions with which they agree. This is the case of Facebook and Twitter, for example. Echo chambers work as follows: a user shares their opinion, and the chamber, i.e. the social network around the user, allows the opinion to echo back to the user, because it is also shared, distributed by others. In the case of social media, the echo chamber theory states that users consume content that expresses the same point of view as their own.

International examples that illustrate agenda setting theory and the intermediate variables agenda setting and reverse agenda setting:

- A clear example of reverse agenda setting occurred during the Black Lives Matter movement. The media's increased coverage of systemic racism, police violence, and social justice was driven by mounting public concern and protests over incidents of police brutality, especially those involving George Floyd in 2020.

- The Obama administration's policies provided a unique case study in which micro-agenda setters contributed to both supportive and oppositional movements. On March 23, 2010, President Obama signed the Affordable Care Act (ACA), also known as Obamacare, into law. This was one of Obama's signature policies and saw extensive engagement from micro-agenda setters. Supporters used social media campaigns. They used campaigns such as #GetCovered. These campaigns promoted the policy. Meanwhile, critics used digital spaces. They used these spaces to challenge the policy. This decentralized discussion influenced public sentiment and mainstream media narratives (Weeks et al., 2019). Social media influencers played a crucial role in shaping the public discourse around Obamacare as agenda setters. Barack Obama himself participated in digital campaigns, appearing in a viral Funny or Die interview with Zach Galifianakis, which significantly increased enrollment. Celebrities such as Ellen DeGeneres, LeBron James, John Legend, Kerry Washington used Twitter and Instagram to encourage enrollment. The #GetCovered campaign, supported by influencers and advocacy groups, generated widespread engagement, especially among young adults and marginalized communities.

**Research area:**

**The role of micro-agenda setters in influencing political perceptions in the Romanian presidential elections – November 2024**

In an era where social networks shape political perceptions and decisions, the 2024 Romanian presidential elections brought to the forefront an increasingly relevant phenomenon: micro-agenda setters – small or medium-sized influencers who manage to set the information agenda within their circles of followers. These actors, far from being established public figures, have been at the center of strategic campaigns to subtly influence the electorate, especially the young audience.

*Objective* - The research aims to identify divergent and convergent perceptions of Romanian voters from different generations and educational backgrounds regarding the influence of social networks and their role in setting the agenda in the 2024 presidential elections.

*The focus group method in political communication research: application in the context of the November 202 presidential elections in Romania*

*Justification for the choice of method*

The focus group method is a valuable tool in qualitative research in the field of political communication, providing direct access to the perceptions, attitudes and reasoning of voters. This method involves organizing guided discussions between strategically selected participants, in a moderated setting, with the aim of exploring in depth how the political message is received and understood (Krueger & Casey, 2015).

In the context of the Romanian presidential elections, held in November 2024, focus groups become particularly relevant for investigating how voters interact with political content in digital media. The emergence of micro-agenda setters, influencers with moderate but highly engaged audiences, has contributed to reshaping the channels through which electoral information circulates and gains relevance. Thus, focus groups allow for the examination of differences in perception between various segments of the electorate – depending on age, education, profession and media consumption – and provide a contextualized understanding of the process of personal agenda formation. By applying this method, the research captures not only individual opinions, but also the discursive dynamics, mechanisms of intersubjective influence and forms of meaning negotiation that

## How micro-agenda setters acted in the 2024 Romanian presidential election campaign

arise within group interactions. Unlike quantitative surveys, which measure the frequency of opinions, focus groups reveal the complexity of electoral thinking, including contradictions, hesitations and affective interpretations of political messages.

### *Methodology:*

Two focus groups were organized with participants selected to reflect the demographic diversity of the Romanian electorate:

*Focus group 1:* 8 participants (18-35 years old, 50% women, 50% men, high school and university education); They are frequent users of platforms such as TikTok, Instagram, YouTube, Facebook.

*Focus group 2:* 8 participants (35-65 years old, 50% women, 50% men, high school and higher education); They predominantly use television, Facebook, WhatsApp groups and online media.

The selection followed the principles of controlled heterogeneity to avoid polarization or domination of the discussion by cohesive groups (Krueger & Casey, 2015). Participants were recruited through nomination and self-selection, excluding individuals with declared political affiliation. This approach highlights how social platforms, the media agenda, and personal experiences intersect in the construction of contemporary political perception.

Two focus groups with contrasting profiles were conducted to ensure triangulation of perceptions:

Table 3: Composition of focus groups

<i><b>Focus Group</b></i>	<i><b>Composition</b></i>
Focus group 1	Young people aged 18–35, students, digital creators, freelancers, employees in the private sector; mostly urban. Media consumption: dominantly digital (TikTok, Instagram, YouTube).
Focus group 2	Adults between 35–65 years old, teachers, civil servants, technical and public service workers, retirees; mixed urban-rural background. Media consumption: mixed (TV, Facebook, online press).

Each group was composed of 8 participants, selected through theoretical sampling, with attention to gender diversity, training and attitude towards digital politics.

### *Interview guide:*

The moderator followed a set of semi-structured questions, designed to stimulate dialogue and reflection on the relationship between electoral communication and individual perception:

1. What were the main sources of political information in the 2024 presidential campaign?
2. Have you noticed people (micro-influencers, friends, acquaintances) who promoted themes or candidates on social networks? How did you perceive these interventions?
3. What impact did the messages/campaigns distributed by micro-agenda setters have on your opinions or voting decision?

4. Have you participated in online discussions/groups about elections? How did you perceive the atmosphere and quality of information?

5. How do you compare the influence of social media with that of traditional media in forming opinions about candidates?

6. What are the risks and benefits of involving micro-agenda setters in electoral campaigns?

***Response analysis and thematic coding***

***1. Information sources*** – purpose: to assess the general perception of the role of social networks in electoral information.

*Focus group 1 (youth, social media):*

The majority mentioned social networks (TikTok, Instagram, Facebook) as the main source of information, appreciating the speed and diversity of opinions. Traditional sources (TV, radio) were used only for validation or within the family.

*Focus group 2 (adults, mass media):*

Television and online mass- media remained the main sources of information.

Social media was used more passively, to receive information distributed by relatives/friends.

*Emerging themes:*

Social networks as the main source of electoral contact for young people.

Positive perception regarding accessibility, but negative regarding credibility.

Most young participants considered social media to be the “center of gravity” of the campaign, but also a chaotic space. One respondent said: “You bump into politics even when you don’t want to. I was scrolling TikTok and an election clip would pop up between two dances.”

***2. Visibility of micro-agenda setters*** – purpose: understanding the informal influence coming from the close network or influencers.

*Focus group 1 (youth, social media):*

Participants noted the presence of micro-influencers or politically active friends, who promoted issues or candidates, sometimes subtly, sometimes explicitly.

Messages coming from people they identified with had a greater impact.

*Focus group 2 (adults, mass media):*

The influence of micro-influencers was considered low, but messages distributed by trusted people (family, friends) still had an impact.

*Emerging themes:*

High symbolic legitimacy of niche influencers.

Perception of authenticity compared to traditional politicians.

Young people reported that opinions expressed by peers or lifestyle influencers had a major impact: “*If I’ve been following someone for years and they say ‘go vote,’ I listen to them. I don’t look at what the candidate says on Facebook.*”

***3. Impact of micro-agenda setter messages*** - purpose: identifying exposure to disinformation or polarizing content.

*Focus group 1 (youth, social media):*

Many admitted that certain viral campaigns or personalized messages influenced their perception of candidates, especially when integrated into lifestyle content.

Some mentioned that their voting decision was influenced by arguments presented by micro-influencers.

## How micro-agenda setters acted in the 2024 Romanian presidential election campaign

### *Focus group 2 (adults, mass media):*

Participants stated that their voting decision was less influenced by social media, but some topics promoted online ended up being discussed within the family.

### *Emerging themes:*

Frequent distribution via Facebook and WhatsApp in group 2.

Young people encountered such messages on TikTok, but with an ironic filter.

Expressions such as “anti-EU/NATO narratives”, “conspiracy videos”, “pro-Russian messages”, “lack of verification”, “I saw them, but I didn’t believe them” were used.

Many participants acknowledged exposure to false or propagandistic content, but they varied in their response to it: *“I saw posts saying ‘don’t vote, everything is rigged’. I found it manipulative, but others in the group took them seriously.”*

**4. Participation in online discussions** – purpose: determining the dominant media channels in influencing the voting decision.

### *Focus group 1 (youth, social media):*

Participants were active in discussion groups on WhatsApp, Facebook or Telegram, where they noted both the diversity of opinions, as well as polarization and disinformation.

Some appreciated moderated groups, others avoided toxic spaces.

### *Focus group 2 (adults, mass media):*

Participation in online discussions was reduced; preference went towards face-to-face discussions or passively following online conversations.

### *Emerging themes:*

Facebook and WhatsApp as centers for passive content distribution.

Younger participants avoided groups or perceived them as invasive.

The following phrases were also used in group discussions: “polarized groups”, “political memes”, “unverified news”, “tense atmosphere”, “casual discussions”.

A respondent from group 2 noted: *“On the school parents’ WhatsApp group, someone would send anti-candidate articles every day. I wouldn’t even respond, but people would read.”*

**5. Social media vs. traditional media** – purpose: to determine the dominant media channels in influencing the voting decision.

### *Focus group 1 (youth, social media):*

Social media was viewed as more impactful and significant for the younger generation, offering exposure to a wide range of opinions and viral content.

### *Focus group 2 (adults, mass media):*

Traditional mass media was perceived as more credible, but participants acknowledged the increasing impact of social media on young people.

### *Emerging themes:*

Mass media still has authority among people 40+, but young people perceive it as distant.

Voting decisions are rarely attributable to a single source.

Frequently used phrases: “TV = structuring ideas”, “social media = emotional impulse”, “combination of sources”, “TV more credible than TikTok”.

Older participants stated that *“you make the decision with your head, not with your phone”*, while young people indicated that social networks “create the context” in which the motivation to vote appears.

**6. Risks and benefits regarding micro-agenda setters** – purpose: assessing the impact of social platforms in electoral mobilization.

*Focus group 1 (youth, social media):*

Rapid dissemination of information, increasing youth participation, personalization of messages, bringing into discussion topics ignored by the media.

*Focus group 2 (adults, traditional media):*

Spreading misinformation, polarizing communities, manipulating public opinion, difficulty verifying information

*Emerging themes:*

Social networks are essential for mobilization, not just for information.

Young people feel a positive pressure to participate from their networks.

Frequently used phrases: “TikTok was decisive”, “influencer campaigns”, “herd effect”, “without social media I wouldn’t have voted”, “you can’t reach young people without Insta and TikTok”, etc.

A participant from group 1 stated: “A clip made by a comedian convinced me to vote, not an official commercial. It was funny, but also serious at the same time.”

**Table 4: Comparative summary of focus group questions**

Aspect analyzed	Focus group 1 (youth, social media)	Focus group 2 (adults, media)
Main source of information	Social media, online groups	TV, online mass-media, passive social media
Visibility of micro-agenda setters	High, direct influence	Low, indirect influence (through the network)
Impact on voting	Medium high, especially through viral content	Low, but some topics have reached the family
Participation in online discussions	Active, diversity and polarization	Low, preference for offline discussions
Media credibility	Skepticism, multiple verification	Higher trust in media and TV influencers
Risks and benefits	Focus on personalization and viralization, but also on the risk of misinformation	Limited benefits, higher perceived risks

***Conclusions and theoretical implications:***

The results obtained confirm the hypotheses according to which social networks play an increasingly active role in establishing the perceived political agenda, especially among young voters. *Micro-agenda setters* – influencers or content creators with moderate but intensely connected audiences – manage to outline topics of interest, to mobilize emotionally and to influence the selection of relevant topics for the electorate. *Micro-agenda setters* had a significant impact on young people, influencing both the topics of discussion and the perception of candidates.

For adults, the impact was lower, but not non-existent: personal networks functioned as micro-agenda setters, especially in a family context. Social media facilitated exposure to diverse opinions, but also increased the risk of polarization and misinformation. Traditional media remains the main source for adults, but the influence of social media is growing, especially among young people

## How micro-agenda setters acted in the 2024 Romanian presidential election campaign

The differences between the two groups validate the hypothesis of the fragmentation of the electoral agenda according to age, education and information channel. Young people are receptive to an informal, collaborative agenda, built online, while the mature public remains anchored in the classic paradigms of political communication. These findings support both the *intermedia agenda setting* theory and the *reverse agenda setting* theory.

This reality confirms a transition from the classic unidirectional model (media → public) to a *reticular dynamic*, in which content circulates between media, social networks and the public in a circular, participatory flow. Phenomena such as *intermedia agenda setting* (Harder et al., 2017), *reverse agenda setting* (Meraz, 2011) and *networked salience* (Vargo et al., 2018) become not only theoretically valid, but operational in the analysis of digital electoral campaigns.

### *Guiding directions for political communication strategies*

#### *1. Integrating micro-agenda setters into the digital strategy*

Parties and candidates should collaborate (transparently and ethically) with influencers who are active in relevant online communities – not just for message amplification, but for contextual legitimacy. Impact is not measured only in reach, but in the density of interactions and symbolic authority.

#### *2. Adapting content to the logic of each platform*

Rigid, formal or culturally unadapted messages do not perform on TikTok or Instagram. A creative, narrative and visual approach specific to each platform is required.

#### *3. Monitoring viral topics and reacting quickly*

Candidates and their teams should follow not only the press, but also social media trends, to identify in real time emerging topics that shape public opinion (dynamic agenda building).

#### *4. Authenticity and dialogue, not just transmission*

Users – especially young people – value authentic interaction and reciprocity. One-way communication is perceived as artificial and rejected.

#### *5. Combating disinformation through trusted opinion leaders*

Campaigns should co-opt educational or specialized content creators to correct distorted messages, in an informal but credible setting for the public.

### *Limitations of the study and future directions*

This research is exploratory, limited by the small sample (two focus groups) and the subjective nature of the qualitative data. It cannot be generalized to the entire electorate, but it offers valuable clues about perceptual differences and new centers of influence.

For future research, I propose: complementing the qualitative data with quantitative analyses (e.g. surveys, social media analytics), studying the networks of dissemination of political content in digital environments, investigating the role of artificial intelligence and algorithms in promoting certain thematic agendas.

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#### Article Info

*Received:* May 18 2025

*Accepted:* May 26 2025

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#### How to cite this article:

Dogaru, A. L. (2025). How micro-agenda setters acted in the 2024 Romanian presidential election campaign. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 104 – 120.



## ORIGINAL PAPER

# The impact of innovative methods in post-communist social assistance, for people with disabilities

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**Abstract.** This paper focuses on a comparative analysis of the development of social work services, starting from the communist era, when the profession was officially eradicated, and continuing along its path towards the use of modern techniques and methods, which are currently being successfully applied in developed European countries and other regions of the world. The implementation of these innovative methods in social work has become a priority in promoting the autonomy and integration of people with disabilities. During this period, social services were practically non-existent, unrecognized and focused on institutionalization, which limited the individual development of people with disabilities and deprived them of the opportunity to live in a manner consistent with fundamental human rights. Beginning around 1989-1990, the profession of social work was revived and, over time, new assistive technologies, online counseling, and art, music, and nature therapies were introduced to increase the active participation and autonomy of these individuals.

The study examines the perceptions of 58 social workers regarding the effectiveness of these methods, how often they are used, and their impact on beneficiaries. The purpose of the analysis is to highlight the role of new techniques and methods in developing social, cognitive, and emotional competencies. The results indicate that innovative approaches contribute significantly to increasing the autonomy and social integration of beneficiaries. The conclusions emphasize the need to expand and adapt these methods to increase the efficiency of social services, particularly in the context of neoliberal trends aimed at reducing state intervention, so that vulnerable individuals receive the support they need.

**Keywords:** *Social assistance, communism, social services, disabilities, social and integration effects.*

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## **1. Introduction**

The general objective of this paper is to conduct an analysis, based on several specialised sources, of the development of social assistance services for people with disabilities from the communist era to their transition to modern techniques and methods currently in use. Another aim of the research is to analyse the perceptions of 58 social work specialists regarding the impact of the use of modern methods and techniques. This transition from an institutionalised approach to modern, beneficiary-centred methods is highlighted by studies whose data indicate high levels of individual autonomy.

Research in this area has emphasised the need for a personalised relationship between social workers and clients, a complex process that requires mutual involvement and continuous adaptation. Tailoring social services to specific needs has become an alternative to the traditional model, which has been criticised for creating dependency among beneficiaries and for lacking innovation. The model of personalised social services focuses on adapting to the needs of each individual, giving them the opportunity to actively participate in the management of their services and, most importantly, the ability to choose and maintain control.

The ultimate goal is for individuals to take control of their own lives and care, with the exception of people with intellectual disabilities, whose limited decision-making capacity leads to the delegation of these responsibilities and choices to relatives or care centres (Prandini, R., 2018:1-7).

The research explores social workers' perceptions regarding the effectiveness of modern intervention methods in enhancing the autonomy, personal development, and social integration of people with disabilities.

## **2. General perspective on the evolution of the social assistance system (1920-2025)**

The social assistance system in Romania has undergone a significant evolution during the last century, adapting to the economic, social and, above all, political changes. The historical stages of the development of social assistance services can be divided as follows:

- 1920-1945 - diversification and stabilisation of social services.
- 1945-1989 - decline and deterioration of the system during the communist period.
- 1989-present - restructuring, modernisation and adaptation to European Union standards.

Between 1920 and 1945, the Romanian state became increasingly involved in the organisation and professionalisation of social assistance services. During the inter-war period, social welfare issues in Romania became more pressing due to poverty, the increasing number of beggars and vagrants, and children with special needs.

Between 1945 and 1989, Romania's social assistance system underwent a significant decline, mainly due to the ideological policies of the communist regime. In 1948, labour and social welfare issues were further reorganised under the Ministry of Labour and Social Welfare (Manoiu, F. & Epureanu, V., 1996:14).

The communist government rejected the concept of poverty and vulnerable groups and officially denied the need for social assistance, claiming that equality and communist welfare were the foundation of a strong nation. Between 1959 and 1970, the social assistance system functioned only by inertia, as the regime made a systematic effort to dismantle the principles underpinning social assistance institutions, severely undermining their effectiveness (Lambru, M., 1998, 61).

## **The impact of innovative methods in post-communist social assistance, for people with disabilities**

The number of social workers was drastically reduced to less than 200 professionals, whose work was limited to ministerial and district level administration.

After 1989, the transition from communism to democracy led to significant changes in social assistance, ranging from the public recognition of social issues through various channels (administrative, journalistic, political, etc.) to the reconstruction of the social assistance system.

With the change of government, the social assistance system underwent a double reform:

- legislative reform, aimed at restructuring the legal framework and
- administrative reform, aimed at modernising standards, procedures and the training of professionals.

As a result, the public social assistance system was reorganised and the non-governmental organizations sector began to develop as a complementary support system (Drăghici, E., 2022: 19).

### **3. The Impact of social assistance services on people with disabilities**

In Romania, the post-1989 socio-economic transition and the development of the legislative framework led to an expansion of social services at the national, regional, and local levels. Defined as interventions in employment, healthcare, education, and social security, these services are funded by public authorities or the private sector.

By 2005, Romania had 1,451 public social assistance units, of which 71.67% provided services for children, 11.65% for people with disabilities and 9.10% for the elderly.

The country experienced visible growth in both public and private social services, before and after joining the European Union (Andrioni, F., 2011: 2-6).

The entire transition period was marked by decentralization the reconstruction of territorial social assistance networks and the modernization of services (Lambru, M., 1998: 61).

At the same time, non-profit organisations (NGOs), associations, foundations developed, public-private partnerships increased significantly. The transition period highlighted the need for an efficient social assistance system, with a clear strategy and well-defined competencies to manage the growing demand for social services and the high costs of reform (Drăghici, E., 2022:20-21).

Assessing the quality of life of a person with a disability involves considering physical, mental and spiritual aspects, as well as economic and social resources. The medical approach is closely linked to therapeutic interventions that support autonomy in daily activities (Domnariu, C., Pop, S., & Domnariu, P., 2014:1-3).

The relationship between social professionals and vulnerable individuals is circular, highlighting how these two dimensions influence each other. Variables such as attachment, defensive style and cooperation form the basis of effective therapeutic interventions (Lingiardi, V., Tanzilli, A., & Colli, A., 2008: 4-6).

### **4. Research design and methodology**

The data collection process was carried out over an extended period, from November

2024 to March 2025, to ensure a representative sample.

The questionnaire used, entitled "*Questionnaire on innovative methods and techniques used by social workers: practical experiences and Impact on People with*

*Disabilities*", was primarily addressed to active social workers in the public and private sectors, and other professionals involved in supporting people with disabilities.

To develop the questionnaire, various validated studies and surveys were analysed and the EBPAS-15 (*Evidence-Based Practice Attitude Scale-15*) was selected for its relevance. Developed by Gregory A. Aarons in 2004, the EBPAS-15 assesses the attitudes of mental health service providers towards the adoption of evidence-based practices. This tool is widely used in the United States and internationally and has demonstrated high reliability. The validity of the full EBPAS-15 scale has been repeatedly confirmed, emphasising its multidimensional nature (Santesson et al., 2020:2-3). The questionnaire is divided into three parts, each with a specific role in exploring the use of innovative practices by social workers in supporting people with disabilities, with a total of 25 questions.

The first part collects socio-demographic data from the respondents, including information such as full name, location, background (urban/rural), age, gender, level of education, field of work, job position and professional experience in social care. These details are essential for characterising the sample and understanding the professional context of the participants.

Section I consists of 10 closed and open-ended questions that focus on assessing social workers' perceptions of the effectiveness of modern intervention techniques and methods, analysing their impact on personal development and the autonomy of beneficiaries. The data analysed in this section were used and presented in a previous article entitled: "*Social Workers' perspectives on innovative methods and techniques in supporting people with disabilities: an empirical analysis*".

Section II explores social workers' perspectives on the role of innovative methods in facilitating social integration and increasing the involvement of people with disabilities in their own decision-making processes. This section includes questions about the challenges faced in using these methods, their effectiveness in improving the quality of life of beneficiaries, and possible improvements to optimise interventions.

The final sample of the study consists of 58 participants, all active professionals in the field of social work, directly involved in the provision of social services to people with disabilities.

Initially, the questionnaire was completed by a larger number of respondents, but some did not meet the established criteria and were excluded from the analysis to maintain the relevance and validity of the results. Participants come from both the public and private sectors, including NGOs and other organisations that support people with disabilities, ensuring a balanced representation of professionals in the field.

## **5. Data analysis**

As part of the research, we chose the quantitative method, which proved to be the most appropriate to achieve the proposed objectives. The process involved an extended data collection period (November 2024 - March 2025) to ensure a representative sample, followed by statistical analysis and presentation of the results.

This approach allowed the identification of significant patterns and correlations, using tables and graphs for clear interpretation of the data. This proved to be the most appropriate method for achieving the research objectives. It also allowed us to highlight the perceptions of social work professionals regarding the impact of these methods on the autonomy and social integration of people with disabilities.

## The impact of innovative methods in post-communist social assistance, for people with disabilities

Section II contains 10 questions (items 11-20) that explore the role of innovative methods and techniques in the social integration, autonomy and self-determination of people with disabilities.

The questionnaire contains a variety of question types:

- a trichotomous question with three different response options: 'yes', 'no' and 'don't know/no response', allowing respondents to choose between affirmation, negation or lack of information/opinion (item 11).

- items 12 and 16 allow for multiple responses by selecting multiple options regarding observed progress.

- items 14, 15, 17 and 18 are Likert scale questions with multiple levels, such as:

"Not at all / To a lesser extent / ... / To a very great extent", "Very effective" to "Ineffective", plus a fifth response option: "I don't know / No answer", which does not fit into the scale itself, but allows respondents not to rate effectiveness, with numerical classifications ranging from 0 to 5.

- open-ended questions requiring honest, text-based answers (items 13, 19 and 20).

The questionnaire therefore combines standardised response questions, which are useful for quantifying information, with open-ended questions, which allow for additional, personalised details about respondents' experiences and perceptions.

Section II has two specific aims:

- to explore social workers' perceptions of the effectiveness of innovative methods in developing the skills of people with disabilities.

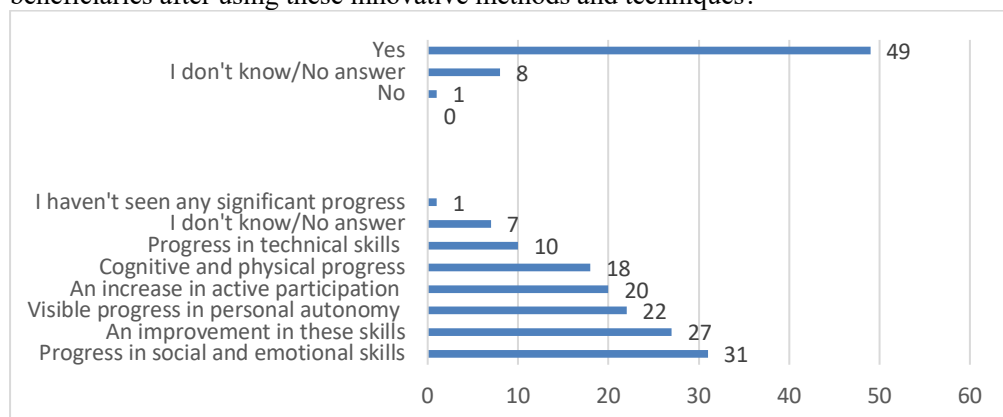
- to investigate the impact of these methods on the autonomy and social integration of the beneficiaries.

The administration of this questionnaire was designed to meet two specific and relevant research objectives:

- Items 11, 12, 18 and 19 correspond to research objective no. 1: to investigate social workers' perceptions of the effectiveness of innovative methods in developing the skills of people with disabilities.

- Questions 11 and 12 analyse the impact of innovative methods on the personal development and autonomy of the beneficiaries:

*Figure 1. Question 11. Have you seen improvements in the personal development of beneficiaries after using these innovative methods and techniques?*

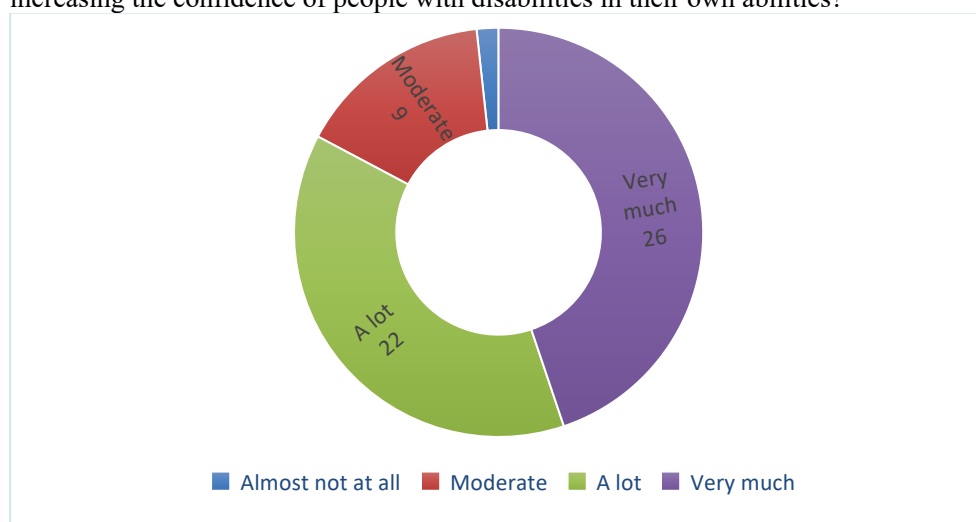


(Source: generated by the authors)

The graph shows the positive impact of the use of innovative methods and techniques on the personal development of the beneficiaries. Most respondents (49 people) observed improvements, with only 1 person not making any significant progress and 8 respondents not giving a clear answer. The most reported benefits include progress in social and emotional skills (31 responses), improvement in personal skills (27), increased autonomy (22) and active participation (20). In contrast, progress in technical skills (10 responses) and cognitive/physical progress (18) were less frequently observed. These data suggest that innovative methods contribute significantly to personal development, particularly in terms of social integration and beneficiary autonomy.

Question 18 assesses the contribution of these methods, to increasing confidence in one's own abilities:

*Figure 2. Question 18. To what extent do you think innovative methods contribute to increasing the confidence of people with disabilities in their own abilities?*



(Source: generated by the authors)

Most respondents feel that these methods have a significant positive impact, Most respondents feel that these methods have a significant positive impact, as shown below:

- 26 people (around 45%) believe that they make a great contribution
- 22 people (around 38%) consider the impact to be high
- a smaller number of 9 respondents (around 16%) consider the impact to be moderate
- while an insignificant percentage, less than 1%, believe they have minimal impact.

These results highlight the importance of implementing innovative strategies to increase the autonomy and self-confidence of people with disabilities and indicate a continuous need to develop and adapt these methods within social support and integration programmes.

Question 19 is an open-ended question asking which innovative methods are considered most effective for personal development. The identified results have been grouped by type of methods and techniques as follows:

## The impact of innovative methods in post-communist social assistance, for people with disabilities

✓ assistive technologies and digitalisation, which includes the use of technology

to support the personal development of beneficiaries, especially those with disabilities. Assistive technologies and digital methods are seen as useful for communication, learning and autonomy. Examples of responses include: *"Video calls for the deaf, mobile applications designed for the deaf"* *"The use of devices that emit both sounds and signals"* *"Assistive technologies"* *"Online counselling, telemedicine"* *"Digitalisation"* *"At this historical stage, I believe that the use of technology can make a difference"*

✓ the use of modern technologies is one of the most frequently mentioned methods, demonstrating the positive impact of digitalisation on the development of beneficiaries. These solutions allow better communication, access to information and greater autonomy for these people.

✓ art therapy or creative therapies, which are often used to improve emotional

well-being, socialisation and personal development: *"Art therapy, basic skills training"*, *"Art therapy and nature therapy"*, *"Communication through art"*, *"Associative, cognitive, playful methods and art therapy"*, *"Dance therapy, music, workshops"*, *"Creative workshops, art therapy methods, music, dance, social activities, excursions, nature walks, etc."*.

*"Music and dance therapy!"*

✓ methods based on social interaction and counselling: many respondents emphasised the importance of counselling, group therapy and integrated interventions. Examples from the responses: *"Counselling, assistive devices, etc."*

*"Counselling and animal-assisted therapy"* *"Counselling, sensory-motor art therapy"* *"Group therapy and therapy with several specialists at the same time"* *"Integrated interventions by specialists"* *"Group therapy"*.

✓ the importance of accompanying methods that promote the beneficiaries'

independence and help them develop self-confidence: *"Learning independent living skills"* *"Those that provide greater autonomy"* *"Specifically for beneficiaries with severe intellectual disabilities, I believe dance therapy, music and workshops are effective"* *"Physical therapy activities through aquatic therapy, learning through virtual reality and augmented reality"*.

Items 13, 14, 15, 16 and 17 correspond to **research objective 2**, which is to analyse the impact of these methods on the autonomy and social integration of the beneficiaries.

One of the main difficulties that beneficiaries face in using innovative methods is the lack of access and the necessary knowledge to use them effectively. Many people with disabilities were not previously familiar with these methods and some, especially older people, "do not know how to use technology" or "are afraid of new technologies". The degree of disability plays a crucial role and affects the understanding and use of these methods, especially for people with "cognitive deficits, rigidity towards new experiences".

In addition, lack of confidence and fear of change are significant barriers as some beneficiaries find it difficult to accept alternative therapies. One specialist noted that *"many beneficiaries lose concentration very easily and get bored quickly"*, making it difficult to maintain their engagement in new activities.

In addition, limited access to technology and physical limitations such as "*speech and mobility impairments*" make the adoption of new methods more difficult.

Another major challenge is the lack of material and human resources, both at the level of the beneficiaries and at the level of the organisations. Specialists pointed out that "*the difficulties lie with the organisations because there are no financial resources*" and that "*the lack of family support*" significantly affects the progress of the beneficiaries.

In addition, some beneficiaries show reluctance and refusal to cooperate as they struggle with "*fear of the new*" and do not immediately see the positive effects of these methods. One practitioner emphasised that "*they want an immediate result, they don't trust the process*", explaining that the lack of quick results can demotivate beneficiaries.

In fact, the social system, including institutional disinterest and the isolation of people with disabilities, further complicates the application of these methods.

Table 1. Perception of the effectiveness of innovative methods in social integration and improving the quality of life of people with disabilities

Category	Item 14 What is the effectiveness of these innovative methods in terms of the level of social integration of beneficiaries with disabilities?	Item 15 Item 15 What is the effectiveness of these innovative methods in improving the quality of life of people with disabilities?
Very effective	7 responses (12,07%)	12 responses (20,69%)
Effective	44 responses (75,86%)	37 responses (63,79%)
Slightly effective	4 responses (6,90%)	5 responses (8,62%)
Ineffective	-	1 responses (1,72%)
Don't know/No answer	3 responses (5,17%)	3 responses (5,17%)

(Source: generated by the authors)

The data analysis for question 16 shows that innovative methods are generally perceived as effective both in terms of social integration of beneficiaries with disabilities and in terms of improving their quality of life. The analysis of the responses shows that the most common suggestions for improving the methods and techniques used to support people with disabilities are: increasing the financial and human resources allocated, adapting the methods to the individual needs of the beneficiaries, continuing professional training for professionals and integrating the latest assistive technologies.

The perception of professionals who have used innovative methods with people with disabilities (question 20) is predominantly *positive*, with reports of positive feedback from beneficiaries, despite initial reservations in some cases. Many professionals observed that people with disabilities expressed gratitude and satisfaction, stating that

## **The impact of innovative methods in post-communist social assistance, for people with disabilities**

these methods had improved their physical and psychological comfort, increased their self-confidence, facilitated their social and professional integration.

A frequently cited example is the positive reaction of deaf people who were "*delighted that these methods allow them to always have access to a sign language interpreter*", this has significantly improved their communication and autonomy.

Specialists also found that many beneficiaries needed time to understand the impact of innovative methods. However, as they began to see the results, they became more engaged and motivated. Movement and art therapy were among the most appreciated methods, with professionals noting that beneficiaries felt more active, relaxed and happy. Some even mentioned that these methods helped them to reduce depression and become more mentally resilient. At the same time, some professionals reported that if these methods had been used earlier, the beneficiaries' recovery process would have been more effective.

However, there were also cases where professionals observed initial resistance from beneficiaries, some of whom were sceptical or found these methods difficult to use. However, once involved in the activities, most recognised their usefulness and became more open to participation: "*These methods are appreciated and followed with great interest! Personally, I received only positive feedback, but the results were not noticed from the very first sessions!*"; "*The beneficiaries are initially curious and later, in most cases, satisfied with the new approach*".

### **6. Conclusions**

To reduce poverty, prevent social exclusion and ensure better living conditions for children, young people, the elderly and people with disabilities, close cooperation between government, local authorities, non-governmental organisations and civil society is essential. At the same time, citizens must also be actively involved for these measures to have a real and lasting impact (Bolborici, A., 2018:5-6).

The results obtained confirm the two main research objectives. Firstly, the analysis of social professionals' perceptions of the effectiveness of modern techniques and methods shows a significant impact in promoting the autonomy and personal development of people with disabilities. Many respondents felt that innovative methods contributed 'a lot' or 'very much' to increasing beneficiaries' confidence in their abilities, highlighting the need to integrate these techniques into social care.

These findings are supported by professional literature, which highlights the importance of personalising social services to effectively meet individual needs and encourage beneficiaries' active participation in the recovery and social integration process (Prandini, 2018).

Secondly, the research analysed the role of innovative methods in facilitating social integration and increasing the involvement of beneficiaries in their own decision-making processes. The data show that methods based on assistive technologies, creative therapies and individualised counselling contribute significantly to improving quality of life and reducing dependence on the traditional social assistance system. This shift from an institutionalised to a beneficiary-centred approach reflects a wider trend in the development of social assistance, which has also been highlighted in post-communist reforms in Romania. Thus, the implementation of flexible social policies, tailored to the specific needs of people with disabilities, becomes essential to strengthen an efficient and sustainable social assistance system.

In conclusion, professionals perceive innovative methods as having a significant positive impact on the development of beneficiaries, helping them to feel more useful, engaged and confident in their own abilities. Professionals believe that these methods should be implemented and expanded as they contribute to better social integration and quality of life for people with disabilities.

The significant gap between social rules and everyday reality highlights the urgent need for more effective solutions to improve the situation. It is important that authorities continuously assess people's needs, ensure that social services meet quality standards and evaluate their impact so that they can be continuously improved.

These conclusions are supported by the research of Domnariu, Pop & Domnariu (2014), which emphasises that the use of modern technologies and interventions in social assistance can have a significant impact on the autonomy of beneficiaries. In this context, the transition from an institutionalised to a beneficiary-centred approach, which is also evident in Romania's post-communist reforms, reflects a larger movement in the development of social services. Therefore, the implementation of flexible social policies tailored to the specific needs of people with disabilities becomes essential for building an efficient and sustainable social assistance system (Drăghici, 2022).

#### **Authors' Contributions:**

The authors contributed equally to this work.

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## **The impact of innovative methods in post-communist social assistance, for people with disabilities**

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### **Article Info**

*Received:* May 06 2025

*Accepted:* May 25 2025

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#### **How to cite this article:**

Felea (Bochiș), E. M., Popp, L. E. (2025). The impact of innovative methods in post-communist social assistance, for people with disabilities. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 121 – 131.



## ORIGINAL PAPER

# The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections

Luiza-Maria Filimon<sup>1)</sup>

### Abstract:

In the three elections cycles for the European Parliament (EP) organized between 2014 and 2024, *Rassemblement National* (National Rally) (RN) has consistently placed in the first place, each time comfortably receiving more than 20% of the votes (in 2024, even crossing the 30% threshold). These results, in turn, enabled it to claim the most numbers of seats in the EP from those apportioned to France. RN's victory in the 2014 European elections – while not singular – marked the beginning of a radical right trend that would come to dominate European politics for the next decade. While to an extent, RN's performance can be attributed to the second order nature of the European elections, the consistency of the results coupled with the broader radical right trend at the European level are indicative of the fact that European elections are turning into critical contests that allow these parties to strive and challenge the mainstream status quo in order to advance their political agenda in the national arena. The present article analyses the political manifesto that RN adopted for the 2024 EP election, with the research providing a qualitative framework to identify and categorize the prevalent themes used by RN during the electoral campaign, in order to assess the extent to which the party stayed within the established right-wing patterns rooted in Euroscepticism and anti-immigration, or, on the contrary, whether, it had moderated its stances in order to appeal to a broader electorate.

**Keywords:** *European elections, European Parliament, political manifesto, radical right parties, Rassemblement National.*

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# The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections

## Introduction

Over the last decade, the claim that radical right parties have an uphill battle to establish themselves as serious electoral contenders has been steadily contested by their results in European elections. The case of *Rassemblement National* (RN, Eng. trans.: National Rally) – the perennial fringe party in French politics (Bell, 2017; Hainsworth, 2004; Marcus, 1995; Fysh & Wolfreys, 1992) – is notable because for the last three European electoral cycles (2014, 2019, 2024), the party has emerged not just as a viable challenger, but, as a matter of fact, it has become the party to beat in this type of election. An argument can be made that these results are a by-product of the European elections' second order character (Wondreys, 2023; Filimon, 2016) which fosters uncanny electoral behaviors that would not be otherwise replicated in national elections. However, what is striking in this case, is the consistency with which RN has dominated the European electoral contest over a decade: while there was an ebb in the vote share from 2019 compared to 2014 (– 1.52%), the number of votes increased (+ 565,478), and, in 2024, RN's gained near ten percentage points (+ 8.03%) relative to 2019, crossing the psychological threshold of 30% in voters' support (France Politique (n.d.); Guillou, 2024).

Moreover, due to a series of unforced errors, precipitated by President Macron's decision to dissolve the National Assembly and call for immediate snap elections in the aftermath of the 2024 European elections, RN – which until then had remained an unpalatable option at the national level, was not only able to replicate the level of support from the European elections, but, once again it improved its score. Receiving over ten million in both rounds of the legislative elections, RN's results surpassed even the gains from the European elections, by over two million votes (+ 2,881,975 in the first round / + 2,343,105 in the second round, compared to the European elections) (see Table no. 1). RN would be shut out from the government negotiations, the centre-right parties erecting a fragile *cordon sanitaire* that also excluded the winners of the elections, the left-wing coalition *Nouveau Front Populaire* (Eng. trans.: New Popular Front). The emerging minority government would be short-lived – arguably, the shortest-lived since the establishment of the Fifth Republic in 1958 (Breteau, 2024). Per the French constitution, which affirms that the Assembly cannot be dissolved within one year from the previous elections, the earliest date when elections can be convened again would be in the summer of 2025. In light of these results, we can posit that the national elections' proximity to the European ones created a spillover effect and enabled RN to build on the momentum accumulated from the European elections, for which the RN average voter assigns first order significance since it is an arena that their party dominates in French politics.

Table no. 1: *Rassemblement National's* Results in the 2024 European and National Assembly Elections

2024 Elections Results in France							
European Elections	Vote Share	1 <sup>st</sup> Rd. of Legislative Election	Vote Share	+ / –	2 <sup>nd</sup> Rd. of Legislative Election	Vote Share	+ / –
7,765,939	31.37%	10,647,914	33.2%	+ 2,881,975	10,110,079	37.1%	+ 2,343,105

The present article analyses the messages disseminated throughout the campaign for the European elections by RN, with a focus on RN's political manifesto as a primary

source of research. Using textual analysis to extract the main topics addressed, the study assesses how the party frames certain issues (the European Union, migration, economy) on a radical – moderate axis, seeking to determine whether the party upholds a narrative premised on traditional radical rhetorical framings or whether it moderates its rhetoric to broaden its electoral appeal. The analysis finds that RN's electoral narrative simultaneously both conceals and reveals a radical dynamic in order to expand the voting pool without alienating the traditional RN/FN voters. In subsidiary, the article also reviews the topics addressed in the manifesto launched by Patriots for Europe for the 2024 European elections, the Euro-group of which RN was a member of, in order to assess whether there exists an overlap between the issues identified or as concerns the courses of actions proposed to maximize the electoral potential of these actors

### Overview of RN's Electoral Evolution in European Politics

From a historical perspective, the evolution of RN's performances in the European elections is noteworthy: its participation, under the initial *Front National* (FN, Eng. trans.: National Front) designation, began with the second election for the European Parliament (EP) in 1984, when it was the last party to cross the electoral threshold, occupying the fourth place, though notably, not with an insignificant margin of the vote share (10.95%). The score obtained in the 1984 European elections marked a turning point in the party's political evolution because it came after a series of consecutive electoral defeats between 1973 and 1981: not only did FN fail to enter the National Assembly, but it did not even qualify for the second round in the either of the elections from 1973, 1978, and 1981, with the scores worsening from one election to the other (0.5% in 1973; 0.3% in 1987; 0.2% in 1981). In the presidential elections from 1974, the party's founder, Jean-Marie Le Pen came in the seventh place, obtaining 0.75% of the votes and under 200.000 votes, while in the elections from 1981, Le Pen was unable to obtain the 500 sponsorship signatures mandated by the electoral law and therefore failed even to meet the criteria required to have his name placed on the voting ballot (DeClair, 1999, 44).

As can be seen from Table no. 2, the four decades in which RN participated in European elections can be grouped under three cycles, each comprised of three sets of European elections, where we can discern that the party's performance ebbs and flows, registering consistently high or low scores during a cycle (the first cycle, marking the party's political establishment, covers the elections from 1984, 1989, and 1994; the second one, characterized by degrowth, contains the elections from 1999, 2004 and 2009; while the third cycle, of resurgence, encompasses the elections from 2014, 2019, and 2024).

This last cycle ushers in the era of respectable politics for European radical parties (McDonnell & Werner, 2020; McDonnell & Werner, 2017), which the party marks with a rebrand in June 2018. In a move to peel off its extremist past and under the spirit of *dédiabolisation* (Eng. trans.: de-demonization), the party's name changes from *Front National* to that of *Rassemblement National*. As testament to FN's toxic brand, Marine Le Pen justified the party's renaming on the basis that "The National Front name carries an epic and glorious history that no one should deny. But you know, for many French people, it is a psychological blockage. For some it's a brake on joining us or voting" (McNicoll, 2018). Erwan Lecœur posits that "the aim is to give the impression that it is renovating the FN to open it up to new alliances in order to gain power" (Le Monde, 2018).

## The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections

Table no. 2: *Front National / Rassemblement National's* Performance in European Elections (1984-2024). Source: France Politique, “Élections européennes (1984-2024)”, <https://www.france-politique.fr/elections-europeennes.htm>.

No.	Year	European Elections	Placemen t	Vote Share	+ / – %	No. of votes	EP Seat s	Gaine d/ Lost Seats
1.	1984	Second EP	4 <sup>th</sup> place	10.95%	new	2,210,334	10	new
2.	1989	Third EP	3 <sup>rd</sup> place	11.73%	+ 0.78%	2,129,668	10	0
3.	1994	Fourth EP	5 <sup>th</sup> place	10.52%	– 1.21%	2,050,086	11	+ 1
4.	1999	Fifth EP	8 <sup>th</sup> place	5.70%	– 4.82%	1,005,113	5	– 6
5.	2004	Sixth EP	4 <sup>th</sup> place	9.81%	+ 4.11 %	1,684,792	7	+ 2
6.	2009	Seventh EP	6 <sup>th</sup> place	6.30%	– 3.51%	1,091,691	3	– 4
7.	2014	<b>Eighth EP</b>	1 <sup>st</sup> place	24.86 %	<b>+ 18.56%</b>	<b>4,712,461</b>	24	+ 21
8.	2019	<b>Ninth EP*</b>	1 <sup>st</sup> place	23.34 %	<b>– 1.52%</b>	<b>5,286,939</b>	23	– 1
9.	2024	<b>Tenth EP</b>	1 <sup>st</sup> place	31.37%	<b>+ 8.03%</b>	<b>7,765,939</b>	30	+ 7

\*After 2018, Front National adopted the name *Rassemblement National*

After the 2024 European elections, RN was the leading party by numbers of MEPs in the radical right and Eurosceptic Patriots for Europe (Pfe) group, providing more than a third of the 86 MEPs that form the group. At a distance, the following four places by number of MEPS are occupied by Hungary’s *Fidesz* (10 MEPs); Italy’s *Lega* (8 MEPs), Czech Republic’s ANO 2011 (7 MEPs) and tied for fifth place, Austria’s *Freiheitliche Partei Österreichs* (FPÖ) and Spain’s Vox (6 MEPs). With the exception of RN and Vox, all the other parties have been in government at some point between 2014 and 2024, *Fidesz*’s being the most notable case, establishing itself as the ruling party in Hungary at even earlier point, after the 2010 elections for the national assembly. This state of affairs where nominally radical right parties that espouse messages rooted in intolerance and discrimination that are antithetical to the principles of liberal democracy and EU’s ideal of *unity in diversity*, is indicative of a broader illiberal trend that has become pervasive throughout Europe and which is not symptomatic only in relation to European elections and Eurosceptic attitudes, but it can creep in into national politics as well with profound implications for the stability of the state (see the case of Romania in the aftermath of the cancelled presidential elections from 2024).

In the current EP, Pfe, with a share of 12% of the MEPs, is the third largest group after the European People’s Party (EPP) and the Progressive Alliance of Socialists and Democrats (S&D). While, at first glance, the percentage might seem modest and uncompetitive, Pfe’s position needs to be analysed in relation to the other two right-wing groups that boast radical and even extremist members, namely, the European Conservatives and Reformists (ECR) – which can be ascribed a “moderate” radical bent – and the Europe of Sovereign Nations (ESN) which swings more ultranationalist and where *Alternative für Deutschland* (AfD) is the most notable presence and with 14 MEPs, the largest party in the group.

Pfe is the third iteration of a radical group that has been spearheaded by RN’s previous leader, Marine Le Pen, after the 2014 European elections, under the name *Europe of Nations and Freedom*, and which, after 2019, was reinstituted as the *Identity and Democracy* group. In all the variations enumerated, RN was the main nodal point, paving

the way for other kindred parties to follow. This marks a major shift in the dynamic of radical parties, since before the 2014 European elections, as McDonnell and Werner observe, other radical right parties such as “[the] Dutch *Partij voor de Vrijheid* (PVV – Party for Freedom), the Italian *Lega Nord* (LN – Northern League), and the Austrian *Freiheitliche Partei Österreichs* (FPÖ – Austrian Freedom Party) had disavowed any similarities to the French Front National” (McDonnell & Werner, 2020: 127-128).

### Research Framework

The research focuses on the textual analysis of RN’s campaign manifesto based on the premise that political campaigns have proven to significantly impact the voters who are receptive to this form of political communication (Benoit, 2017: 4). Relative to their salience in European elections and the voters’ attitudes, three key issues are highlighted: direction of the European Union, the migration issue, and the need to *take back control* of the economy. The article also analyses the manifesto of the Patriots for Europe – the political family which RN is a member of – reviewing how these issues are addressed by the party and the group, from both an electoral and policy position.

While various factors influence electoral behavior (Fisher et al., eds., 2018; Bahnsen, Gschwend, & Stotzer, 2020; Habersack, 2024), electoral manifestos provide an overview of the ideology and policy directions, representing a distillation of the party agenda during an electoral cycle. According to Daniela Braun, “the documents represent the collective internal expression of the policy preferences of political parties” (Braun, 2023: 439). In identifying how the issues are framed, the research approach highlights to what extent the radical rhetoric is present in the construction of these manifestos or whether it is coded in order to appeal to a wider audience.

While a broader framework for discourse analysis could encompass the statements of the candidates, interviews and debates, the present analysis focuses on the deconstruction of the manifesto on account that the *objectivity* of the data included in these documents surpasses that of other sources. In this sense, Braun’s observation is once again relevant, since the issues expressed in the manifesto tend to find a correspondent in the policies stances promoted by the party once elected. Based on previous RN’s participations in European elections, the relation between RN’s Euromanifestos and the party’s stance in the Eurogroups it helped established during 2014, 2019, and 2024, is identifiable and, its impact quantifiable.

### The Patriots for Europe’s Manifesto: Nations Lead the Way

At less than 550 words, PFE’s manifesto extols the virtues of nations which find themselves at a crossroad between continuing on the path to create a “European central state” or returning to their sovereignist roots. In setting up this binary framework, the document argues that the current actors in the EU are no longer divided along ideological lines, but split between the *Centralists* (or Federalists) and the *Patriots* and *Sovereignists* – the former are in a favor of a European *superstate*, the latter want to safeguard the Europe of Nations. The document states that the EU – “once a dream project” – has strayed from its original purpose, turning against the very Europeans it purports to represents and acting contrary to the interests of nations. Adopting an Eurosceptic tone, the manifesto portrays European institutions as “largely unknown” to the electorate and “removed from the European citizens, warning in a conspiratorial manner that these institutions in collaboration with a large swath of non-state actors (“globalist forces”) intend “to replace nations” (Patriots for Europe – PFE, 2024).

## **The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections**

PfE argues that European policy should be subordinated to the nations and the people of Europe and for this purpose, it outlines the profile of a sovereignist Europe based on a set of characteristics that European nations have or should endeavor towards: “strong, proud and independent”; “sovereign and unwavering”; embracing their European identity – product of “Greco-Roman and Judeo-Christian heritage” – while cherishing diversity; “committed to peace”, but prepared to defend themselves from any threat; safeguarding “real freedoms, fundamental rights and human dignity”; vectors of innovation and excellence – “competitive, productive, efficient” (PfE, 2024). This is a Europe of Europeans that must protect its citizens from various types of threats and “preserve its cultural identity” (PfE, 2024). For this purpose, it should be able to defend its borders and prevent illegal migration.

In relation to the EU, this Europe is interconnected through accountable institutions whose “legitimacy is rooted in nations”; this Europe “respects its own mandate and rules”, “abides by the principle of subsidiarity and proportionality”, and relinquishes its hold on sovereignty; this Europe empowers nations, recognizing their right to pursue an independent foreign policy, unconstrained by shared commitments since diplomacy and foreign policy are inextricably linked to the exercise of sovereignty (PfE, 2024). In other words, PfE’s vision for the EU is that of a classical intergovernmental organization, removed from any federalist pretense.

### ***Rassemblement National*’s Manifesto for the 2024 European Elections: Between Radical Patterns and Moderate Outliers?**

Under the slogan *La France revient, l’Europe revit* (Eng. trans.: “France returns, Europe lives again”), RN’s manifesto was framed as a project for a Europe of Nations with the European elections providing an opportunity for historic change (“*basculément historique*”) against what it referred to as “a centralized European superstate” (Rassemblement National (RN), 2024: 2). This *super-État* had failed to adequately respond to the needs of the citizens, while, with each major crisis, it derived more and more power to the detriment of state sovereignty (“*s’arroger des compétences supplémentaires au détriment de la souveraineté des États*”) (RN, 2024: 2). The sovereignty of the state and of the people is a core theme of the manifesto, further referenced with an indirect callback to the Brexit campaign slogan – *Take back control*: “the people have the power to take back control of their destiny” (“*les peuples ont le pouvoir de reprendre leur destin en main*”) (RN, 2024: 2).

RN projected itself as the flagbearer of nations united by the pursuit of power, without which nothing could be accomplished, neither on issues of defense, nor on socio-economic matters. For this purpose, the manifesto invoked the mythical figure of de Gaulle to legitimate these claims. Relevant for the present analysis is how RN framed its vision of the European project, despite the Eurosceptic cues interspersed throughout the document. In this sense, RN’s aim is not dismantle the EU, but to reshape it according to a Gaullist-inspired organization (Eng. trans: “*une organisation qui soit pour elle un multiplicateur de puissance*”; Eng. trans: “an organization that is for it a power multiplier”) (RN, 2024: 2). For this purpose, RN advanced three policy axes that would protect, respect the voice of the people and produce the tools to “defend both the lifestyles and standard of living”, in order to make them resilient to the challenges posed by the 21<sup>st</sup> century (RN, 2024: 2). These directions of actions are presented in detail under sections titled: *A Europe that Protects*; *A Europe that Produces*; *A Europe that Respects*. Each, in

turn, is split into multiple subpoints and supported by clearly-defined measures and policy frameworks.

The manifesto was conceived around a traffic light strategy designed to take back control by rebooting the European framework using the EP as the conduit through which to implement the outlined roadmap (“*La stratégie tricolore... Au Parlement européen, ... constitue notre feuille de route*”) (RN, 2024: 5). The strategy was intended to achieve goals that could be described as reasonable from an ordinary voter’s point of view, with the tone being patriotic, but not outlandishly nationalistic: “put Europe in the service of the people, defend France’s interests, and protect the French people” (RN, 2024: 5). The traffic light colors were used to identify and delimitate between different areas of cooperation:

- *green* referred to the areas of cooperation that RN would support: industrial and technical cooperation, particularly on artificial intelligence; development of scientific exchanges; Erasmus mobilities; pooling material resources for civil protection (RN, 2024: 5);
- *orange* referred to the areas of cooperation that needed to be renegotiated: the Schengen Area, provided that free movement benefited exclusively nationals of Member States (MS); the Frontex agency, provided that it protected European borders and was authorized to return illegal migrants; the single market, provided that fair competition was restored (RN, 2024: 5);
- *red* referred to the areas of cooperation that would be rejected on account of being contrary to French interests: European diplomacy and defense; the issue of France’s nuclear deterrent; EU management of immigration within MS; European interference in matters of energy sovereignty; all forms of EU enlargement; the strengthening of the Commission’s powers; the issuance of debt and the creation of taxes by Brussels; the elimination of the states’ right of veto within the Council (RN, 2024: 5).

After laying out the tricolor strategy, the manifesto presented RN’s accomplishments in the ninth EP, outlining six areas in which the party took a stand in European affairs. These areas can be divided into three main topics: a) RN as an opposition party; b) RN as an (pro)-active party; c) RN as a party that defends French identity and the values of civilization. In the first case, the party portrayed itself as being against European policies that would have a deleterious effect on France: the only French party that opposed the Migration Pact and the Green Deal, the increase of French contributions to the EU budget, the creation of European taxes, or future enlargements.

Secondly, RN showcased its activity, signaling the extent of the party’s institutionalization in the EP (“nearly 14,000 amendments tabled on more than a thousand texts and 1,700 interpellations from the Commission, the National Rally deputies made a significant contribution to parliamentary activity to defend France and the French people”) (RN, 2024: 6-7). The leader of the party, Jordan Bardella, was credited with having an attendance record of 94% in plenary sessions. The party characterized its activity as “constructive opposition”, noting that it did not reject policies that could benefit the French people (for example, in issues concerning police and judicial cooperation, or even, battery recycling). On the issue of RN’s institutionalization, we can mention that the document cites Fabrice Leggeri – who, from 2015 to 2022, was Director of Frontex – and who was the third candidate on RN’s lists for the 2024 European elections.

Thirdly, RN described the ideological breakthroughs it achieved despite being in opposition both at the European and national level, by normalizing discussions on issues

## The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections

such as “sovereignty, reindustrialization, fair competition, pragmatic monetary policy, or migration control” (RN, 2024: 6-7). On the topic of national identity and values, RN denounced Brussels’ “woke excesses” (“*dérives wokes*”) and singled out the threat posed by Islamism which the European project was unable and unwilling to address (“*Au Parlement européen, ils ont dénoncé l’entrisme de l’islamisme*”) (RN, 2024: 6-7).

On the topic of the economy, RN’s vision for *Europe that Protects* focuses on the trade and competition sectors, emphasizing the issues affecting the single market, stemming, on the one hand, from the successive waves of enlargement, and, on the other, from opening the single market to the rest of the world (“*Notre économie est exposée à une concurrence déloyale sauvage*”) (RN, 2024: 8). Though the party describes itself as a “fervent promoter of economic patriotism”, it does so in a manner that also focuses on the betterment of Europe – a Europe of nations that is strengthened by fair competition and reciprocity. In other words, it does not advocate for a break with Europe or a decoupling of France from the EU.

Policy recommendations are further detailed in the section on *Europe that Produces* where it criticizes the European Commission for adopting measures in the industry, agriculture, and energy sectors rooted in a *punitive ecology* as expressed through the Green Deal, seen as responsible for the decline of the European economy. Consequently, RN proposes that in order to restore France’s economic prosperity and preserve the French social model, they would restore full sovereign control over policy areas where the MS had previously ceded control. Consequently, the party states that France should have energy sovereignty and become a *paradis énergétique*. Two directions of action are identified: at the state level – where RN advocates for cuts in the energy bill, safeguards of the French electricity mix, and ecological diplomacy – and in the business sector – where it proposes a policy of debureaucratization to foster France’s competitive realignment with Europe through a “Buy French or European” framework agreement (RN, 2024: 10-11). The recommendations have a technocratic quality, with specific measures presented in detail that would draw the attention of an informed public, rather than appeal to low information voters.

If the economic setting allows RN to couch Eurosceptic right-wing tropes into a technical, Euro-pragmatic argument (see for example: “the banning European aid that finances relocations within the single market”) (RN, 2024: 8), where security is concerned, the rhetorical coding is less stable and a racialized dynamic cannot be concealed altogether. Though it is shrouded in an appeal to security, the framing calls back to more traditional RN tropes by conflating mass immigration (“existential threat to European nations” – “*une menace existentielle pour les nations européennes*”) with great replacement dog-whistles (“major demographic shifts”) and the Islamist threat (RN, 2024: 9). At the same time, the European Commission and President Macron are criticized for being too lenient on migration, the manifesto stating that MS risk to be fined if they oppose EU migration distribution schemes (for a comprehensive counterpoint, see ENAR, 2023; Spencer & Triandafyllidou, eds., 2020). In this way, RN is securitizing French and European identity by advancing a security framework designed to ensure the historical continuity of France and Europe. As concerns the European policy on migration, the party proposes “*un tournant de fermeté en matière migratoire*” (Eng. trans.: “hard turn on migration”) which is operationalized through seven policy recommendations:

- establish a dual French and European border: control national borders, set up a border with the outside, allow Frontex to return illegal migrants;
- limit free movement within the Schengen Area only to nationals of MS;

- eliminate public subsidies to pro-migrant NGOs, combat human trafficking, and prosecute aid for illegal immigration;
- organize the processing of asylum applications in the embassies and consulates of countries of origin to prevent immigration from becoming a fait accompli;
- expel illegal immigrants, Islamists, and foreign criminals;
- make development aid paid to third countries conditional on keeping populations in their countries of origin and / or ensuring that their nationals will be returned to the countries of origin;
- organize a referendum in France to reaffirm the primacy of the French Constitution in matters of immigration (RN, 2024: 9).

We can see how the stereotype of migration as *une menace existentielle* was reconfigured through RN's employed discursive practices into a broad spectrum of options that could resonate with diverse types of voters, outside the party's electoral pool, all the more so, when coupled with an electorate dissatisfied with the performance of President Macron (Maillard, 2024).

Finally, as regards the future of the EU, the section on *Europe that Respects* envisages an intergovernmental alternative, instead of the "centralized European state" overseen by the technocratic European Commission where the power of the states is diluted and the interests of the people are impacted in a negative way. RN's proposes a European Alliance of Nations, described as "a cooperative organization serving the people, respectful of democracy and national sovereignty" (RN, 2024: 12). This part of the manifesto can be characterized as Eurosceptic, RN's criticizing the decision-making process of the EU, accusing the Commission of taking advantage of the various crises impacting Europe, to acquire more and more prerogatives that immiserate the people ("*Quand Bruxelles décide, les Français subissent.*") (RN, 2024: 12). Furthermore, states that exercise their sovereignty risk to be sanctioned by the Commission.

In this context, RN's proposal is not to dismantle the EU, but to revise the European treaties in order to rebuild the EU as a Europe of nations – an institutional organization where states are the main actors and where the Commission is transformed into a "General Secretariat of the Council without decision-making power or legislative initiative" (RN, 2024: 12). As observed throughout the document, RN integrates state-centered positions ("superiority of the French Constitution over European [...] jurisdictions"; legislative initiative, exclusive to the Council; states' right of veto, including on trade issues); identitarian stances ("defend and promote European civilization by opposing the unravelling of our history, our cultures, and our values, and rejecting Turkey's accession to the EU"); with EU law principles ("apply the principles of subsidiarity and proportionality so that all decisions are taken as closely as possible to the people"); and international standards ("adoption of the Declaration of the Rights of Peoples and Nations, an additional tool in international law to protect the sovereignty of nations, human freedoms, the diversity of civilizations, [...], and to assist in the peaceful resolution of conflicts") (RN, 2024: 12).

On the technocratic dimension, the manifesto identifies a secondary dimension, needed to develop the *Europe that Respects*, based in projects and cooperation. Along with cooperation on border issues and industrial policy, scientific innovation is paramount to ensure the prosperity of Europe, and this can be achieved by developing cohesive tailor-made projects adapted to each country's needs ("*refaire de l'Europe une opportunité plutôt qu'un frein, un pôle d'excellence qui rayonne et relève les enjeux technologiques, écologiques ou migratoires de demain*"; Eng. trans.: "make Europe an opportunity rather

## The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections

than a hindrance, a center of excellence that shines and addresses the technological, ecological, and migratory challenges of tomorrow”) (RN, 2024: 13). A separate section is dedicated to artificial intelligence which is linked to European technological independence and whose applications range from the implementation of a sovereign European cloud to bridging strategic dependencies in the defense sector (RN, 2024: 16).

The manifesto also has a section dedicated to climate change, acknowledging the challenges posed by the climate crisis in terms of the economic impact, the negative toll on the citizens, and the degradation of the environment. Far from denialism, RN, once again, integrates the climate issue into the discussion about power, supporting policies that foster “symbiosis between humans and their environment”, boasting that Europe is “at the forefront of decarbonization”, and introducing the concept of “ecological diplomacy” where France occupies a providential place due to its *virtuous energy model*, having invested in nuclear energy and developing hydrogen-based technologies (“*grâce à sa maîtrise de l’énergie nucléaire et à sa capacité de développer de nouvelles technologies*”) (RN, 2024: 14). The wellbeing of ordinary citizens and the prosperity of private enterprises are also invoked, with the party proposing an incremental transition from combustion-power cars and the modernization of the infrastructure that should not be disruptive to the economy (RN, 2024: 14).

Finally, one other topic referenced by the manifesto addresses the issue of the return of war in Europe and the need for strengthening European defense. The Russian aggression in Ukraine is given as an example of the new security environment in which Europe finds itself unprepared. While RN leadership has been inconsistent in its position towards Russia (Lefief, 2024) and belatedly reconsidered its Russophilia (Guillou, 2025), the manifesto referred to the Russian military actions as “violating international law” and exposing European vulnerabilities. This inadequacy of the defense sector was a byproduct of the “generalized disarmament” pursued by European nations, under the naïve assumption that the United States would always meet their security needs. Once again, RN links the pursuit of power with the ability to ensure one’s defense and stresses the need for military cooperation in the service of force projection. The document points to France as “the only country to benefit from a comprehensive defense capability” in the current context, arguing that Europe should prioritize the European defense industry and European arms production and focus on reducing its dependencies through cooperation in order to become less reliant on external sources of military aid (RN, 2024: 15).

### Conclusions

The analysis of the manifesto has showed that RN utilizes a vocabulary that combines themes traditionally associated with the party (European identity, rejection of immigration) with contemporary issues that have a wide impact on nations and communities of people, packaged in a technocratic framework designed to appeal to a diverse audience. Moreover, in light of President Macron's unpopularity (Taylor, 2024), the voters had an additional incentive to be drawn to RN. In this regard, the manifesto also functioned as an indictment of the president, criticized for implementing policies that had weakened the French state and affected the wellbeing of French citizens.

Another significant aspect to consider is the extent to which the Brexit campaign appeared to be a source of inspiration, from invoking the mantra of *taking back control* to the talking point about “giving the French their money back”, which referred to the amount of money France sends to the EU versus what it receives in return (“*L’UE coûte plus cher qu’elle ne rapporte*”) (RN, 2024: 13). RN referred to this states of affairs as “a

real waste of taxpayers' money", citing again several actions that could be taken to address this issue (RN, 2024: 13).

Where RN's manifesto was steeped in policy recommendations ranging from the single market to artificial intelligence and the climate crisis, the PpE manifesto was a stark contrast, solely dedicated to extolling the virtues of nations and sketching a handful of proposals to reform the EU, meant to subordinate the decision-making process to the wills of the nations. The vague and laconic nature of the document could be indicative of the parties' different, even, contradictory stances on the various issues that RN addressed in a comprehensive way in its manifesto.

Lastly, though RN pursues a policy of respectability and professionalization, the radical impulses remain in the open, intertwining anti-immigration screeds with the supremacist view of Europe as a locus of identity and a matrix of civilization. This matrix is currently being tarnished by migrants and its integrity would be further jeopardized if the EU would continue to impose on the nations its enlargement and migration policies. Though this is consistent with the party's history and its voters' attitudes, the direct references to this radical framework are also indicative of a larger change affecting the attitudes of the general audience, who is being pulled by the slippery siren song of radicalization into embracing illiberal policies designed to reshape them, the state, and the EU in the image of these radical actors, such as *Rassemblement National*.

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#### Article Info

*Received:* April 28 2024

*Accepted:* May 18 2025

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#### How to cite this article:

Filimon, L. M. (2025). The Poster Child for the Radical Right Ascent: *Rassemblement National* and the 2024 European Elections. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 132 – 144.



## ORIGINAL PAPER

# Risks and opportunities of smart education

Diana-Maria Grosu<sup>1)</sup>, Virgil Stoica<sup>2)</sup>

### Abstract:

Smart education integrates technology into teaching and learning, which can present both opportunities and challenges. The aim of the study is to highlight the impact of intelligent education on the learning process of students, as well as the effect it has on the new teaching methods of teachers. The objectives of the research are to identify the risks of technology in education, as well as identifying the opportunities accessible to students due to the digitalization of the teaching-learning process. This study is relevant because of the changing technology has brought to education in recent years. The question at the heart of the research is: How does intelligent education influence student outcomes and transform teachers' pedagogical approaches? The article uses a qualitative approach, based on the analysis of academic literature and secondary data presented in the form of graphs and tables. They reflect trends in intelligent education, international initiatives and contributing to a deeper understanding of the phenomenon. Smart education enhances learning through flexible access to resources, interactivity, but also requires teachers to adapt to new methods and technologies. Smart education is not only about the use of technology in the classroom, but also about modern delivery methods and content adaptation.

**Keywords:** *digital education, smart pedagogy, sustainability, emergency remote teaching, COVID-19*

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## 1. Introduction

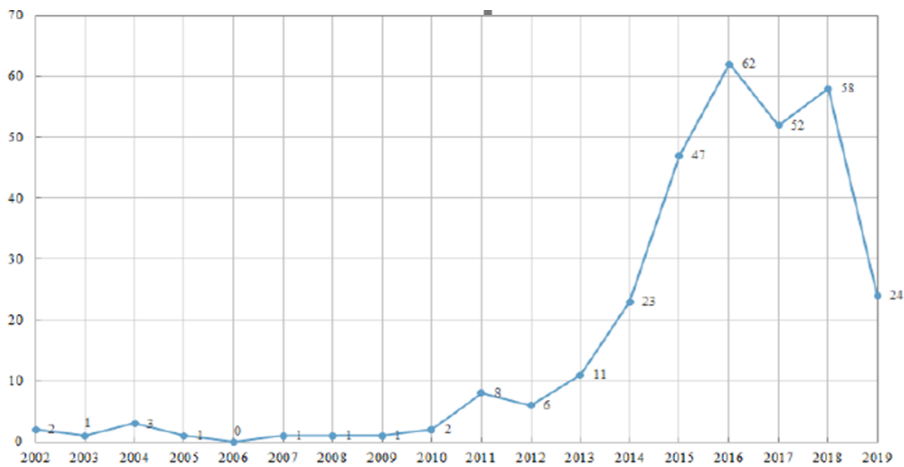
The evolution of technology has permeated all sectors of society; however, it has not progressed equally across all countries, leading to disparities, including within educational systems (Salehi & Largani, 2020: 9-21).

The term "smart" first appeared during the 1970s, when the topic of automating mass production in enterprises was very seriously discussed. The roots of the concept of smart education were based on the "Malaysian Smart School Implementation Plan" project in 1997 (Chan, 2002: 15-22). In the same year, the development of a smart city was discussed, whereby about 50,000 cities would benefit from technology in the next decade (Hollands, 2008: 303-320).

The research on intelligent education started as early as 2002, with only a few more studies been written on the subject in the following seven years. A progress in this area of interest was seen in the year 2010, as shown in Figure 1, and then its peak was reached in 2016, with a total of 62 articles (Yu et al., 2020). This was followed by a short period of stagnation in the publication of articles on the topic of intelligent education, with a drastically negative percentage in 2019.

According to Figure 2, a significant number of keywords in the sphere of "smart educational" were used, such as "smart learning", "smart learning environment", "higher education", "technology", "virtual reality", "technology acceptance model (TAM)", "web application", "mobile device", "space", "smart environment", "performance", "model".

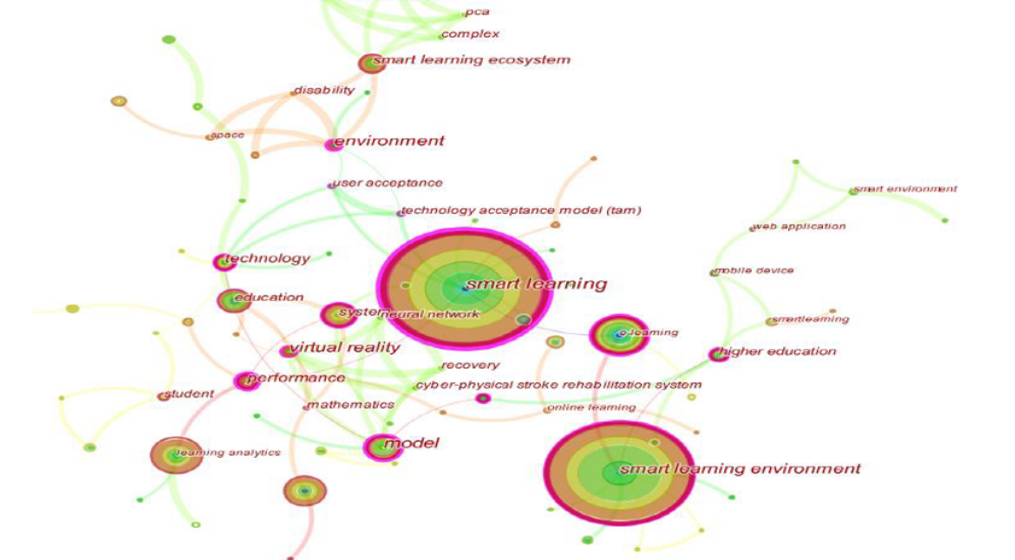
Figure 1. Publication trend evolution



Source: Yu et al., 2020

statistical variable<sup>10</sup>

smartness detection



In the sphere of intelligent education, as shown in Table 1, a top ten words have

been made, and they are presented by the researchers in the following order: "smart learning", "smart learning environment", "e-learning", "learning analytics", "smart education", "system", "education", "model", "smart learning ecosystem" and "performance".

Rank	Keywords	Frequency
1.	smart learning	53

2.	smart learning environment	47
3.	e-learning	18
4.	learning analytics	17
5.	smart education	14
6.	system	11
7.	education	11
8.	model	11
9.	smart learning ecosystem	9
10.	performance	7

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Source: Yu et al., 2020

The digitization of education is a segment of human activity, both scientific and practical, which is related to the link between technology and the achievement of pedagogical goals (Robert, 2002). In other words, through digitization of information the

pupil/student gets to form new knowledge in the field of education, by approaching a modern learning-technique.

Another definition of smart education is also put forward by the authors Z. Zhu and B. He, from which it is clear that its main goal is to achieve "smart" environments with the help of technology, so as to create a personalized pedagogy based on the development of thinking and the formation of a stronger capacity (Zhu & He, n.d.).

According to R. Bajaj and V. Sharma, smart education refers to that form of education that can be accessed anytime and from any possible place (Bajaj & Sharma, 2018: 834-842). These two authors argue that digitized learning goes beyond learning in the traditional manner. At the same time, intelligent education is an educational system, through which, students have the opportunity to study using various materials, according to their personal aptitudes as well as intellectual levels (Jang, 2014: 73-84). These intelligent study environments represent "a new era of educational systems", in which technology, pedagogy, and the fusion of the two are combined, leading to improved learning (Shoikova et al., 2017: 21-30). Smart education provides not only access to technology in education, but also new approaches to teaching and learning (Kadir, 2021).

M. Yu and Y. Liao defined smart teaching as an activity that incorporates instructional tools and teaching objectives. It encompasses three aspects: smart technology, smart teaching, and smart talent cultivation (Yu & Liao, 2021: 607-612). This view is in agreement with K. Sarnok's research (Sarnok et al., 2019: 21-26). On the other hand, P. Twining believes that teachers' individual beliefs are also necessary in their technological professional preparation (Twining et al., 2013: 426-437).

"Smart teaching" is defined by the authors M. Yu and Y Liao as a new method of teaching, aiming to develop "smart talents"; learners who are able to think and learn in a smart way (Yu & Liao, 2021).

This study is important because technology has gradually become an essential part of modern education, particularly since the COVID-19 pandemic. In schools around the world, both teachers and students have been forced to adapt to digital methods of teaching and learning. This transformation has changed the skills needed to teach or learn effectively, the way lessons are taught, and the relationship between teachers and students.

The question underlying the whole article is: How does intelligent education influence student outcomes and transform teachers' pedagogical approaches? In order to answer this question, the article is based on a qualitative approach, based on the analysis of academic literature as well as other (secondary) data presented in the form of tables and graphs.

The results of this analysis show that intelligent education contributes significantly to increasing student engagement and motivation, due to its interactivity and flexible access to diversified educational resources. At the same time, this new form of education requires teachers to adapt to new teaching methods, leading to a redefinition of their role in terms of digital competence, creativity and flexibility.

## **2. Intelligent education across countries and its accelerated digitization during the COVID-19 pandemic**

### **2.1. The contribution of intelligent education in different countries**

The OECD program has shown that education can differ from state to state, with different learning outcomes. One promise that smart technology holds for education is to provide students with a higher quality teaching-learning process (Vincent-Lancrin, 2022).

## Risks and opportunities of smart education

Over time, several countries have introduced the concept of smart education in education by implementing programs based on "smart education" as shown in Tables 2, 3. Moreover, according to Table 4, a number of technologies have been developed in the sphere of intelligent education that present themselves with a dual role in the life of the learner: risk and opportunity. For example, in South Korea, this concept includes self-directed, adaptive education, which relies strictly on technology and no other resources (Kim et al., 2013: 170-178).

Japan is one of the countries that is heavily involved in the development and modernization of education through digitization, with resources being used for Information and Communication Technology (ICT) infrastructure. The strategy that has been used in the document "Use of ICT and Data in School Education" refers to the fact that a high-speed network is needed in the teaching-learning process. This strategy is based on the idea of providing every school unit with the opportunity to work with technology (computers and other digital tools). Japan supports the idea of data privacy, and thus emphasizes the need for cloud computing as well as virtual private networks (VPNs) in its strategy (Ministry of Education Japan, 2019).

In terms of investment, three of the countries that are part of the European Union have divided the funds allocated to technology for education as follows: Germany (through "Digital Pakt" €5 billion were allocated to further improve the infrastructure in school units), Ireland (through the "Digital Strategy for Schools - 2025-2020" €210 million were allocated to improve the ICT infrastructure in the education system), Poland (allocated over €372 million through the "National Education Network", with the main objective of incorporating the necessary technology into school units to develop the education system). Australia has invested through "The National Broadband Network" (NBN), established in 2009, designing a powerful and affordable broadband internet network for all citizens, benefiting pupils/students and teachers. The UK is committed to building a world-class technology infrastructure to invest in the networks of the future, namely 5G and full fiber. The UK is expected to invest a sum of £400 million in the Digital Infrastructure Investment Fund. The United States is putting this area at the center of attention in the education sector, with challenges in accessibility as well as speed as the main barriers for schools. The US faces a lack of competitiveness for broadband services in rural areas. The United States is calling on world leaders to support learning with the necessary devices as well as good internet connectivity. As for the United States' strategy, it includes related elements such as: technical support, network management, device upgrades, equipment upgrades, technology correspondent licensing, firewall protection, and others. The Hungarian government considers that an optimal classroom is made up of interactive display devices suitable for 3D display, but also that each classroom should be equipped with one 3D printer for every 500 primary and secondary school pupils. On the other hand, the Hungarian Government considers that there should be one programmable robot in computer classrooms for every three pupils (Hungarian Government, 2016). In France, a strategy included in the 2015 Digital Education Plan provides for an evaluation of the effects produced by digitization on pupils (ELAINE), as well as the attitude of teachers towards digital learning. Embracing technology in education was a top goal for the top 10 OECD countries in 2017, becoming more evident in 2022. Over the years, there have been several strategies for quality digital education, even reaching the point where

the idea of every student bringing their own device to school has been proposed, through bring-your-own-device (BYOD) policies. In this way, students use their own devices, supported by the school's internet connection. There are no concrete pros or cons on this idea, but some researchers believe that BYOD is not a primary way for students to access digitized education, as not all students have smartphones or tablets. The US considers this a hindrance for teachers, as it would be difficult for a teacher to manage teaching activities across different devices and platforms. There are activities that may be incompatible with certain gadgets. The International Organization for Standardization (ISO) has a group working to support the development of standards for "Information technology for learning, education and training". Technology-enhanced education is supported by several associations, including the "International Association of Smart Learning Environments", which argues that intelligent learning environments need to be developed. Both International Business Machines Corporation (IBM) and Samsung are working in this direction, as these two giants are also developing systems linked to smart education (Van Der Vlies, 2020: 8).

Table 2. Technological investments in the education system

EU and non-EU countries	Technology investment in education		
Germany	<i>DigitalPakt</i>	5 billion euro	Improving infrastructure in schools.
Ireland	<i>The Digital Strategy for Schools</i>	210 million euro	Improving ICT infrastructure in the education system.
Poland	<i>National Education Network</i>	372 million euro	Equipping schools with the necessary technology to develop the educational system.
Australia	<i>The National Broadband Network</i>	Data missing	Australia's National Broadband Network Project.
United Kingdom	<i>Investment Fund for Digital Infrastructure</i>	400 million pounds	Technology infrastructure on a global scale.
Hungary	Data missing	Data missing	The existence of robots in computer classrooms.
France	<i>2015 Digital Education Plan</i>	Data missing	Data missing

Source: Author own work

## Risks and opportunities of smart education

Table 3. Smart education initiatives and programs

Countries	Initiative program/name	Bibliographical references
Malaysia	Malaysian smart school implementation plan	Chan (2002)
Singapore	Intelligent nation (iN2025) master plan	Hua (2012)
South Korea	SMART education project	Kim et al. (2013)
Finland	Systemic learning solutions (SysTech)	Kankaanranta and Makela (2014)
Arab Countries	ALECSO & ITU smart learning framework	Jemni and Khribi (2017)
Australia	Smart student-centric education framework	Zhu et al. (2016b)
United Arab Emirates	Mohammed Bin Rashid smart learning program (MBRSLP)	Lavine and Croome (2018)

Source: Kadir, 2021

Table 4. Smart education technologies

Information technology	Definition
Smart classrooms	Physical learning environments that are supported by technologies
Virtual classrooms	Virtual classrooms, where a new way of teaching and learning takes place
Web 2.0+	The technologies that emerged after Web 1.0, they offer interactive and intelligent services
Educational resources	Learning and teaching material (e-book)
E-books and interactive books	Digital books
Educational robots	Robots used for educational purposes
Ambient intelligence	It stands out with smart interfaces
Serious games	Online games used for instructional purposes
Mobile technology	Using portable mobile devices
Academic and corporate tubes	Online video-sharing platforms serving educational purposes

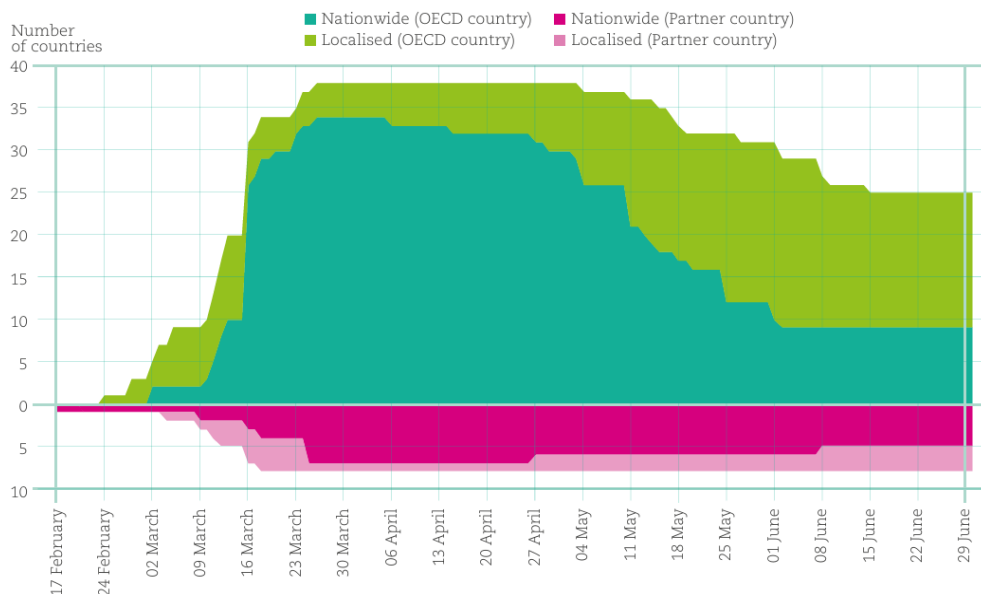
Source: Author own work

### 2.2. The impact of COVID-19 on digitization in education

Between March 23 and the end of April 2020, almost all OECD countries implemented nationwide school closures, resulting in an almost complete shutdown of in-person education. This widespread closure was a major factor that significantly accelerated the digitalization process, while also highlighting and deepening existing risks and inequalities within the education system. Figure 3, developed by UNESCO (2020), illustrates the scale of school closures worldwide during the COVID-19 pandemic. Starting in March, most OECD countries implemented nationwide school closures, which

led to a sudden shift to online education. This measure accelerated the digitalization process in pre-university education, revealing numerous issues such as the lack of digital infrastructure, insufficient teacher training, and significant inequalities among pupils with varying levels of access to technology (Ananiadou & Claro, 2009).

Figure 3. Number of OECD and partner countries with nationwide or local school closures during the first wave of COVID-19



Source: Ananiadou & Claro, 2009

Due to the sudden shift from traditional to modern online-based education, a panic and shock was created among educational establishments, caused by the fact that the usual structure of the educational process was annihilated by digitalization. Academic staff and students complied with the situation and integrated themselves into a process of experimentation with digital education (Crawford et al., 2020: 1-20).

An issue raised during the COVID-19 pandemic concerns teachers and their efforts to adapt to technology. Because of the sudden changes, teachers were faced with the need to become proficient users and not to stick to standard computer literacy. They suddenly had to master 'software' information in order to develop their teaching and learning methods. Following this experience, there have been scientific publications that have sharply criticized the effects that have harmed the educational system, with the emphasis on educational technology (Jameson, 2019: 951-955; Bayne, 2015: 5-20; Woodcock, 2018: 129-142; Selwyn, 2021: 353-368).

### 3. Risks and opportunities of smart education

Some researchers argue that, regardless of the level of education, intelligent education (more specifically, intelligent systems made with the purpose of supporting education) is beneficial in the progress of a pupil/student. Some of the characteristics of intelligent education can be: complexity of education, realization of cognitive and research activities and flexibility.

### 3.1. Opportunities and Risks of Smart Education for Teachers

In the view of M. Ibrahim, H. Yang, M. Yu and Y. Liao, a teacher must be competent to be able to teach in smart classrooms (Ibrahim et al., 2013: 826-836; Yang et al., 2021: 225-231; Yu & Liao, 2021: 607-612). P. Twining is of the opinion that teacher motivation makes a significant contribution in maintaining a quality intelligent learning environment (Twining et al., 2013b: 426-437). Authors such as K. Sarnok and T. Manakul believe that teachers should be technologically literate (Sarnok et al., 2019: 21-26; Manakul & Tuamsuk, 2021: 81-97).

There is the concept of "smart teachers", also used in psychology, this term characterizing a competent person, able to teach digital natives (Barab & Plucker, 2010). There are not many studies showing smart teaching in terms of a teacher's abilities. Today, teachers and parents are not keeping up with the digital age of young children who are born surrounded by technology (DQ Institute, 2017).

There are opinions that a teacher's teaching style may not be effective for some or most students, and because of this, it is recommended that a teacher should combine different teaching styles, such as a multifaceted approach (Hawk & Shah, 2007: 1-19; Moazeni & Pourmohammadi, 2013: 1-7). L. Liu believes that teachers, with the use of smart technology, can find solutions to the challenges that modern education brings to teaching (Liu et al., 2021: 57-71). In this regard, one can also discuss classroom analytics which are meant to help the teacher in the effective orchestration of classroom activities (time framing, suggestions on certain moments the teacher could do in the classroom, which student could be given more attention, feedbacks, etc.). This digital analysis contributes to the professional development of the teacher, as the person receives real-time or post-hoc advice about his/her teaching method (Vincent-Lancrin, 2022).

Smart technologies enable teachers in the following aspects: effectiveness of instruction, reducing anxiety in students' life, accelerating the pace of teaching, supporting students' research activity, developing skills to solve an unpleasant situation, realizing an individual situation for each student. And for the students it allows the following prospects: expanded/developed skills, increased motivation, as well as improved school results (Dmitrenko et al., 2022: 414-429).

### 3.2. Opportunities and Risks of Smart Education for Pupils

One problem that can be mentioned in this respect is that intelligent education does not define the concept of an "intelligent pupil", given that the pupil is the main actor in the educational process. Representatives of the Organization for Economic Cooperation and Development (OECD) have set out ten key attributes that a "smart learner" should have in the 21st century. The attributes have been grouped into four categories: way of working, way of thinking, way of living in the world and tools (Ananiadou & Claro, 2009: 41). Intelligent education gives students with disabilities the opportunity to access curricular materials and to participate in different inclusive activities. At the same time, there are a variety of technologies available to support hearing and visually impaired students to make learning easier. For students with Attention Deficit Hyperactivity Disorder (ADHD) there are technologies to help them self-regulate their bodies. It reduces inequality among pupils by providing free access to technology on school premises. On the other hand, there could also be a negative effect, as socially and economically disadvantaged pupils may not be able to access technology at home or at school if they study in disadvantaged areas and have neither the digital materials nor an internet

connection. Studies claim that technology could be of more help to advanced students, as some of them have already learned the basics of the subjects they are studying, and with digitization, an advanced student has the chance to progress more easily in the learning process, compared to a less prepared student who acquires less knowledge (Vincent-Lancrin, 2022).

It has been found that effective learning for a student is based on personalization. According to the "International Association of Smart Learning Environments", we speak of a smart learning environment when adaptive technologies are used, or when they are set to develop capabilities that enhance understanding (<http://iasle.net/>).

There is a risk that students will be distracted from school tasks, fascinated and excited by educational technologies. Educational technologies provide opportunities for pupils who are not geographically advantaged. Several studies show that learning is different from case to case, depending on the learner (El Janati et al., 2018: 436-443). There are learners who absorb information more quickly because of technology, but there are also learners who are distracted by the technology and its components.

It has been shown that a student understands a lesson better if it is supported by gadgets such as interactive whiteboards, maps, graphs, charts, diagrams, videos, then when the teacher gives an oral lesson, supported only by a traditional blackboard.

## **Results**

Education is a way for pupils/students to communicate in ways other than informal and non-formal, taking into account the rules of the educational institution they attend. In addition to the school rules, pupils/students have to fulfill a number of duties towards the school. It is the Internet that leads the pupil/student to new channels of communication, which in turn have come to transmit educational information that can be used during and beyond their studies. Therefore, these virtual environments can act as levers in the educational field, with a role in the development of the individual.

In order for pupils/students to adapt to the changing digital age workforce, two broad categories have been designed: technical skills (with an emphasis on developing analytical/research skills) and soft skills (with an emphasis on developing critical thinking, emotional intelligence, communication skills, teamwork and leadership). Studies show that the education system needs to focus on more human-centered skills such as communication and creativity and less on more rigid activities.

The 21st century has brought with it advanced changes of technology in education (European Commission, 2019). At the same time, in order for a teacher to have the developed basic skills for transmitting information required in the "Action Plan for Digital Literacy 2021-2027", a number of skills are necessary for a teacher to have - collaboration, communication, technical, creativity, and coping with unpleasant situations (Van Laar et al., 2020: 1-14).

## **Conclusions**

Smart education means that students have the chance to benefit from a more engaging and various studies conducted in the educational space, it has been found that digitization comes to the aid of pupils/students, irrespective of the discipline/faculty they are studying. Research shows that in mathematics, students understand the concepts of geometric shapes more easily as they have the opportunity to visualize mathematical figures in space. The existence of digital textbooks, as well as books in electronic format, allow students to explore subjects in depth. Students can combine the convenient with the

## Risks and opportunities of smart education

useful, allowing young people to develop at their own pace and in their own way. Thanks to smartphones, the teaching-learning process can take place from anywhere. Because digitization is still in the process of development, the possibilities and opportunities for smart education are endless.

Researchers argue both for and against digitization, but it cannot be overlooked that the majority of them believe that its introduction in the educational space is useful.

### Authors' Contributions:

The authors contributed equally to this work.

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#### Article Info

**Received:** March 26 2025

**Accepted:** May 10 2025

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#### How to cite this article:

Grosu, D. M., Stoica, V. (2025). Risks and opportunities of smart education. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 145 – 156.



## ORIGINAL PAPER

# Idioms related to Food and Drink Used in Travelling-Related Situations

Cristina-Gabriela Marin<sup>1)</sup>

### Abstract:

Travelling-related situations are abundant in words and expressions or even idiomatic expressions related to food and drink which reflect the inventiveness of the English language. Therefore, it gives birth to highly suggestive combinations of words which sometimes cannot be understood within a certain context. This article has tried to bring a new approach on a list as comprehensible as possible, comprising words, expressions or idiomatic constructions which we have encountered especially in tourism social-media and to reveal an interesting linguistic area of the English language. My interest in idioms has arisen when gathering materials for a dictionary on Tourism terminology. Moreover, this interest took the form of finding out the origin and then providing clear explanations of these expressions and idioms.

Each English idiom and expression mentioned in this paper carries a food or drink constituent and as a result, the number of this kind of idioms commonly used in travel-related situations is 56 through the close examination of a corpora which has been selected to assist the research. The article reveals not only their degree of idiomacity but also, their level of intelligibility.

**Keywords:** *a different approach, literal meaning, linguistic tool, dual meaning, suggestive combinations, certain combination, etc.*

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### 1. Introduction

The purpose of this article is threefold; firstly it offers a short overview of the studies that have characterized the idiom research in recent years, secondly it explains the method followed to carry out this research, to be more precisely the idioms were selected with particular attention being paid to the criteria involved in this process, to retrieve only the expressions containing a food and drink constituent. The last but not the least, the third part is centred on exposing the linguistic characteristics of food and drink idioms in English therefore revealing the fact that English language is extremely abundant in idiomatic expressions which reflect the wisdom and the inventiveness of the English people.

Up until the mid-to- late twentieth century Western European studies of the English language largely neglected idioms ( Pinnavaia, 2010 : 21).

Possibly owing to the evident discrepancy between form and meaning, even structure scholars Bloomfield and Sapir first, then the generativists Harris and Chomsky later did not account for idioms in their linguistic models. Since the 1970-s English studies regarding idiomatic expressions have become more and more numerous. It is especially in the last twenty to thirty years that work on idioms has proliferated and the quantity and quality of which has surely been determined by the advent of corpus linguistics. With this innovative tool the pervasiveness of idiomatic structures in English language in a variety of text types has become visible. So that many assertions previously ascertained as linguistic intuitions have finally become confirmations.

### 2. Materials and methods

For this paper a large amount of authentic materials were collected from official tourism websites, both from Britain and from USA, travelling blogs, online newspapers and magazines and even social media. The outcomes of this research on one hand will contribute to a better understanding and translation of word and expressions used in travel-related situations and on the other hand they will be helpful for further studies in this field.

The article has a practical direction by offering a list of some common/uncommon English idioms related to food and drink used in tourism and their meanings are better explained by the examples provided. The material is presented alphabetically so that to have a quick access to a selection of food and drink idioms which may be used in tourism/ travelling vocabulary.

### 3. Practical approach

Idioms are such sophisticated features of language that any linguistic definition might be easy to contradict. This means that not all idioms can be characterized by the same linguistic properties. On a semantic level, first, to define idioms as constructions having two readings a *literal* meaning ( or the vehicle) is geographically , historically and culturally bound, while the *figurative* reading (or the tenor) tends to be cross-cultural, as well as spatially and chronologically boundless.

For example, the tenor of the idiom *to spill the beans (to reveal a secret)* is timeless, unlike its vehicle that refers to a voting practice used in Ancient Greek times. However, there are also idioms that do not have a literal interpretation at all, such as *spic and span (neat and clean)*. So a more or less motivated relationship between the two levels of interpretation does not always exist for all idioms. According to Laura Pinnavaia (Pinnavaia, 2010 : 93) „, the descriptions of food and drink elements, the utterance

## Idioms related to Food and Drink Used in Travelling-Related Situations

meanings will vary from being negatively connoted; or else they will just be neutral descriptions". Among the structures labelled as idiomatic in the dictionaries it is possible to identify food and drink idioms that are compositional because their meanings are the combinatorial result of the basic and derived senses of the lexical items and of the syntactic relations in the construction. In order of frequency, this category idioms include verb, noun and prepositional phrases. All these idioms are made up of a food or drink item whose meaning is extended and explained:

### a) The verb phrase

The most frequent syntactic structure for food and drink idioms is the verb phrase, usually having a V+Od structure:

to be apples- all is going well

Everything has **been apples** during our holiday in Greece.

be caviare to the general- to be something good unappreciated by the masses

Unfortunately, many destinations **are caviare to the general!**

be as keen as mustard- to be very enthusiastic about something

*She went to Europe for a vacation and came home **as keen as mustard** to go back.*

be meat and drink (to somebody)- be something that a person enjoys very much or is very interesting

*Going to Greece this summer seems to be everybody's **meat and drink**.*

not be one's cup of tea- not to be what one likes or is interested in

Booking a trip full of adventure is **not my cup of tea!**

to cut a melon- to decide a question

I **have just cut a melon**: we are flying to Greece!

to cut the mustard- to meet requirements, to reach the required standard.

According to our expectations the accommodation **has cut the mustard!**

eat salt with- to be guest of

On this time next week we will be **eating salt with** our friends in Sicily!

feel like a jelly - feel nervous or frightened

*When he got on the cable way he **felt like a jelly** because he was afraid of heights.*

feel one's oats- to be lively and energetic

I always **feel my oats** during my summer holiday!

to have/put all one's eggs into one basket - to invest in one thing only

I should buy shares in a lot of different companies, and not **put all my eggs in the one basket**.

have a finger in the pie- to be involved in a matter

As I **have a finger in the pie**, I have felt so embarrassed by the whole situation !

have one's cake and eat it- to want everything and the benefits

You **cannot have your cake and eat it** - if you want more local services, you cannot expect to pay less tax.

to know one's onions- to have experience

I trust this guide for our itinerary, he seems to **know his onions!**

make a meal of/out of- to spend more time or energy than is necessary

I only asked for a summary of the main sights but she **has made a real meal of them** all.

to live in clover- to be accommodated in a luxurious resort

The resort was impressive so **we live in a clover** for a whole week.

to live off the fat of the land- to have the best of everything

The Romanians always choose Greek islands as holiday destinations because they **live off the fat of the land** there!

put some mustard on it- to do something with increased effort or physical strength

Doing some sport during your holiday means **putting some mustard on it**.

to squeeze the orange- to take all the good from anything

This business is like **squeezing an orange**: it does not matter who is doing the squeezing, you will still get orange juice.

to take the biscuit- to be the most surprising, annoying thing that has happened or somebody has done. (a naval expression from around the 1700's) If you were on a long voyage and having a hard time, all food gone except the ship-biscuit or hardtack, then the last misfortune was to run out of it, or lose it through spoilage. If **the biscuit was taken**, then things were desperate.

take the gilt off the gingerbread- to remove what is attractive from something  
Have you seen our room before being refurbished? Talk about taking the **gilt off the gingerbread**!

tell chalk from cheese- not distinguish one thing from another

I am not surprised George still cannot decide whether to go on holiday or not. That boy is so obtuse; he could not **tell chalk from cheese**.

to upset the applecart- to spoil someone's plans

Look, he is not trying **to upset the applecart**—he just needs to meet later in the day now, that is all.

wine and dine- go to restaurants and enjoy food and drink

If you **wine and dine** during your holiday means going to expensive restaurants and spending a lot of money.

#### b) The noun phrase

The second largest syntactic structure displayed by the food and drink idioms is the noun phrase. These contain a nominal head which is pre- or post-modified.

apple of sodom- something that does not live up to expectations  
Nobody likes it; it's nothing but **an apple of Sodom**.

an apple -pie order- neat and very well organized  
*She keeps all her rooms in an **apple-pie order**.*

apples and oranges- used for a situation in which two things/ alternatives are completely different  
*Which do you think we should choose: going to Greece or to Iceland? That is **apples and oranges**; you cannot compare the two.*

the big enchilada- the most important thing or person  
When it comes to environmental issues, the **big enchilada** is carbon dioxide.

bowl of cherries- a very pleasant situation  
Booking a holiday in Thailand as a gift for his wife has been a **bowl of cherries** for him!

cherry on the cake- the best of a situation  
He put the **cherry on the cake** by buying a beautiful souvenir for his new house.

cream of the crop- the best of a situation  
*She is really the **cream of the crop** and I highly recommend her as your guide for your trip in the Sahara.*

## Idioms related to Food and Drink Used in Travelling-Related Situations

a curate's egg- something that has good and bad points  
The whole holiday has been something of **a curate's egg**.

dead sea apple- something that does not live up to expectations  
The trip to the Sahara was **a dead sea apple** for us, as it was really hot!

the icing on the cake- something attractive which is added to something which is already good  
Cook could become **icing on the cake** for Super Bowl 58 contenders seeking one more ace for their hand.

money for jam- profitable return for little effort  
I'm getting paid to stay in my neighbours' mansion while they're on holiday and that will be **money for jam** for me!

jam tomorrow- something promised that never happens  
I do not know what to believe anymore because going to Thailand seems to **be a jam tomorrow!**

pie in the sky- plan/hope that will never come true  
Their plans to set up their own business are **just pie in the sky**.

the toast of...- the most popular  
Lindos beach **is the toast** of Crete Island!

### c) Prepositional phrases

Turning to nominals that are linked by coordinating conjunctions as you can see below:

as nice as a pie- very kindly and friendly  
*I highly recommend choosing this hotel because the manager is **as nice as pie**.*

beer and skittle- pleasure and fun  
Our holiday was all **beer and skittle**, as everything was fine.

cake and ale- fun and laughter  
**Cake and ale** are the necessary ingredients for a great holiday!

from soup to nuts (Amer.)- from beginning to end  
I attended the official lunch **from soup to nuts**.

good wine needs no bush- good quality needs no advertising  
The offer I have just received is so excellent that it needs no ad campaign, just **as good wine needs no bush**.

a grain of mustard- a small or seemingly insignificant thing that has the potential to grow or develop into something formidable  
This little village seems **to be a grain of mustard**, indeed.

in the egg- very early  
Having all of you here with in my holiday has really been wonderful. This gift **is icing on the cake!**

land of milk and honey – a place where life is pleasant and easy and the people are very happy  
America is **the land of milk and honey**.  
Everybody says that

neither fish, nor flesh, nor good red herring- neither here or there  
The first attempt at a flying car was **neither fish nor fowl**. It was not quite a car and not quite an airplane.

not a sausage- nothing at all  
There was nothing left from the previous lunch! **Not a sausage!**

not made of salt- not disturbed by the wet weather  
 You will not melt in the rain; you are **not made of salt!**  
peaches and cream- delightful thing  
 Life really can be all **peaches and cream**, especially when you travel a lot!  
real jam and fritters- a real treat  
 For me eating seafood is a **real jam and fritters** !  
a square meal – a large and satisfying meal  
 How about today's special? It was a **square meal**, indeed .  
sugar and spice- kind and friendly  
 Our guests have been **sugar and spice** so I highly recommend them!  
the world is one's oyster- there is no limit to the opportunities offered to you  
 Hire a car during your holiday in Canary islands **and the world is your oyster!**

#### 4. Results and discussion

The number of food and drink items that appear in idioms used in travelling-related situations is 56. This figure takes into account all the lexemes regarding food and drink that appear in all idioms. To fruit category belong the following lexemes: *apple, orange, melon, cherry, etc.* To the baked category belong the following lexemes: *biscuit, bread, cake, pie, toast, etc.* To the beverages category belong 2 lexemes: *beer* and *ale*. To the sweets category belong 3 lexemes: *icing, jelly, pudding*. General terms regarding food and drink include the 3 common lexemes: *food, drink and meal*. All the expressions listed above are registered in the monolingual dictionaries as being idiomatic, even though they are composed of a series of lexemes with basic and derived senses. In other words, only one item in each expression has a metaphoric meaning or a derived sense. The transfer from concrete to metaphoric is incidentally more transparent for the meanings of some nouns than it is for others. The nouns with transparent metaphoric meanings are *beef or meat* indicating substance, *bread/ toast* meaning money or material goods, *cream* meaning the best, etc.

#### 5. Conclusions

This study aims at showing that idioms related to food and drinks used in travelling-related situations are not intricate and certainly not uncomplicated features of language, they are actually much more accessible and enjoyable than commonly believed. Food idioms are conventional and metaphorical expressions which are hard to die: once coined they tend to resist time and can be a mirror of a linguistic community's social and cultural past as well as its present consuetude. While the vehicles of metaphoric structures depict social behaviours typical of the period in which they arise, their tenors point to attitudes that are often timeless, and generally true to all mankind living in an area characterized by a certain culture. Having explored the world of food and drink idioms used in travelling and tourism this paper has unveiled some of the mystery that surrounds idioms for both language learners and for native speakers. In other words while being intricate and certainly not complicated features of language, they are actually much more accessible and enjoyable than commonly believed and as a result, our approach has shown how much research in this field of phraseology has progressed ; bringing traditional ideas into a brand new light. Having considered the communicative functions of the food and drink idioms the information gathered from lexicographical and corpora analyses recorded will be working ground for future observations.

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### Article Info

*Received:* April 13 2025

*Accepted:* May 20 2025

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#### How to cite this article:

Marin, C. G. (2025). Idioms related to Food and Drink Used in Travelling-Related Situations. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 157 – 163.



## ORIGINAL PAPER

# The impact of digitalization on the workplaces

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### Abstract:

Few industries will escape the roller coaster of digitalization. Recent studies show that 30% of the revenues of the industrial sectors will be made through new business models in 2025. Digitalization is constantly generating new business models. At the same time, it has a major impact on society and employees. Quantified in the number of lives saved by increasing workplace safety, reducing shopping time and lowering the cost for consumers, digitalization is no longer an abstract concept, but is part of our daily schedule, in private life, but especially at work. Digitalization uses IT infrastructure and the Internet as technological support. According to the World Economic Forum, companies that have achieved digital transformation have, on average, 26 % higher profits than traditional companies. However, technology is only a means through which transformation is generated and not an end in itself.

The paper debates the influence of digitalization on the workplace. From the day the internet came into the world, digitalization has shaken the entire operational structure of workplaces. And nowadays every single thing, whether it's business or individual life, is focused on digital technologies. Some existing studies were on "the effect of digitalization on corporate performance and employee productivity. It is essential to understand that digital transformation at work creates risks as well as opportunities so that the dangers can be removed and the optimistic consequences maximized.

**Keywords:** *digitalization, workplaces, job satisfaction, work-life balance, worker autonomy.*

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# **The impact of digitalization on the workplaces**

## **Introduction**

Digitalization is one of the hottest topics. Most (if not all) organizations today have some form of digital assets. The first is that jobs and occupations evolve as new technologies bring new roles and different processes for working.

The second change relates to working conditions because the adoption of technology brought with it new physical, psychological and environmental demands. In addition, there are significant employment conditions (i.e., the contractual and social conditions of work). Lastly, there are developments in industrial relations enabling different ways of how employers and employees can arrange their relationship and solve their conflicts. This is something relevant for managers who want to know if digitalization is well perceived by the employees, does it affect the employee's satisfaction/starts to change work/life balance and how far could it increase the level of autonomy for the employees. An astute manager can minimize the potential downsides and allow employees to enjoy the upside.

Digitalization introduced the remote work component, which contributed to the reduction of territorial and social barriers to human resources. This can be an opportunity if viewed from the perspective of the flexibility it offers to employees. Furthermore, digitalization innovates job offers, and the study presents the impact of e-commerce on the activity of the labor market.

The social impact of digitalization generates a fierce debate between the decision-makers, economists and industry leaders. As digitalization disrupts society even more deeply, concern grows about how to problems such as jobs, wages, inequality, health, resource efficiency and security. Digital transformation in social media can also make a positive contribution to society. Focus on three key areas: employment and skills, environmental sustainability and trust.

Why we conducted this research is that in the literature review when we read studies about the effect of digitalization, we understood that there are many but the effect of digitalization on business performance and employee productivity has little literature. Their main concerns were not employee satisfaction and effects on work/life balance and worker autonomy, which were our main concerns.

In studies that focused on the three referenced problems, some of the results were ambiguous or even double-faced. Some of these studies — for example, the relationship between worker autonomy and its association with digitalization— are conflicting. Gerten, Beckmann, & Bellmann (2018) found that, yes, digitalization gave employers way more control over their workers, but Aral & Weill (2007) claimed that digitalization provided more autonomy to the employee. This lack of fidelity drove us to examine the hypotheses.

This study examines the effect of digitalization on job satisfaction and work/life balance alongside worker autonomy. We empirically examine how digitalization affects individuals working in Romanian organizations. This paper is structured as follows. We first present the findings of the literature and prior studies that we reviewed. Next, we describe our methodology, analysis, and findings. Finally, the results are discussed and implications and future directions are presented.

## **Theoretical background**

Accessibility gained through teleworking led to higher productivity at work and more overall demands in the workplace and at home. A European Social Observatory (OSE) exploratory study of the impact of digitalization on job content and quality. The

findings indicated that technology impacts work life. About two-thirds of the surveyed workers found that the digitization process led to work intensification and some increase in the speed of work. This means that something automatic like a computer can process the secondary, repetitive task, so employees can concentrate more on some complex that requires human knowledge. According to studies, digitalization provides more efficiencies and more productivity (Vuori, Helander & Okkonen, 2018). In addition, digitalization has led most businesses and future competitive environments through rapid and even disruptive transitions. Emerging new models of organizations and companies (e.g., Airbnb), and old companies need to rethink their structures, roles, and strategies to reach their new business targets. Kettunen & Lanti (2017) regarded new future competitive organizations as agile, sustainable, and more basic, software-based. In the present era, people feel it is hard to run their businesses and personal lives without digital technologies. New business models and new strategies mean job roles are reorganized which may change satisfaction, work/life balance and worker autonomy.

### **Job satisfaction**

A healthy organizational climate is one of those factors that influence long-term job satisfaction. Stemming from a solid organizational culture, the climate defines all working relationships and how any collaboration takes place internally. The activities that set the framework for a pleasant organizational climate include the selection of employees and their match with the position occupied, the existing organizational culture, the appropriate reward actions, the investment in personal and professional development programs, but also constant communication, by providing constructive feedback.

On-the-job learning is among the main interests of the modern employee. Moreover, investing in development programs will not only contribute to the employee's evolution but will also bring benefits to the employing company.

Job satisfaction is the lever to results. Even though we tend to relate to the workplace as a useful tool in personal development, well, it's about more than that. Doing what we like, and identifying with the work we do, contributes to an inner satisfaction, which is propagated, of course, also on the final results. Although it is said a lot, we can associate job satisfaction with happiness.

Non-wage items of job quality are highly valued by workers (Gallie, 2013). That can be seen in growing efforts, both nationally and internationally, to achieve better-quality jobs.

Multiple measures of psychological well-being suggest that employees' drive and job satisfaction are very strongly correlated with discretion. A high pace of work may negatively affect your psychological health, which includes stress (Salvatori, Menon & Zwysen, 2018). In fact, in the last 20 years, European countries witnessed a massive increase in the use of computers (Salvatori, Menon & Zwysen, 2018), one could assume that the degree of workers' job satisfaction rose to a certain extent with the implementation of new technology, and will continue to do so with the advent of new technologies into mainstream business operations.

### **Work-life balance**

First, the employee's perspective is how effectively he could juggle work responsibilities and personal/family obligations. Second, employers should cultivate a supportive environment keeping focus on employee well-being at work (Lockwood, 2003).

## **The impact of digitalization on the workplaces**

The use of technology in leisure time brings clear benefits; a person can voluntarily carry out work for their job at home (for example, create a few reports, presentations, and analysis, etc.) (Ratna & Kaur, 2016). Travel has its advantages as well, delegation from city to city eases the task at hand. That is when employees can decide freely where, when, and how they work.

Working past the deadline can be more stressful for someone. Someone must have some ability to call a halt herself, e.g., never checking office mail only while on duty. Results have proved that the evolution of new tools has caused concerns in employees depending on generations (the gap in the workforce). It also depends on the profession one is engaged in, for example, healthcare professionals and teachers in higher education have stated that the use of technology may be stressful. Derks et al. (2014) explored the influence of work-related smartphone use on daily recovery from work-related efforts. They found that being connected to work at home means that a person has less time to recuperate from related efforts. It implies that the smartphone consumers did not correctly manage the recovery path. Smartphones can be referred to as the increased mobility of an employee, but it means that it is easy for the work/life balance to become blurred.

What matters the most, is how one copes with that and like stated before, it's good to have limits, for example, working after one's workday would not be desirable. A smartphone makes an employee more flexible but also enables them to work more long hours thus having the risk of affecting work/home life balance at the same time. Tech itself is neither a demand nor a resource; it depends on how we manage it (Derks& Bakker, 2010).

So, the first step in maintaining balance is to define precise boundaries. Even if someone works from home, he has to create a space dedicated exclusively to professional activities. This will help him focus better during working hours and completely disconnect after it ends. It is also essential to impose fixed working hours. When someone doesn't have a clear schedule, he may find himself answering emails late at night or working Saturday and Sunday. Setting a well-defined schedule helps him to protect his personal time and prevent burnout.

Our study indicates that the work/work-life balance becomes blurred - which means that employees struggle when people do not switch off from work when they go home. An individual cannot regulate the time spent on technology for work, this is another indicator. As a result, we would anticipate that digitalization blurs the distinction between processing work and personal life.

### **Worker autonomy**

Adapting to a digital age is no longer a choice, it has become an essential condition for organizations to remain competitive, improve their operations and respond to the ever-evolving needs and increasingly demanding demands of customers and employees. For example, the COVID-19 pandemic has demonstrated the need for organizations to be agile and flexible, with remote work and digital collaboration becoming the new norm.

Jeff Bezos, the CEO of Amazon, mentioned in a discussion on the topic of digital transformation that "the only sustainable advantage you can have over others is agility".

Sustainable success in a dynamic and ever-changing business environment requires continuous operational and digital transformation. This transformation must be initiated and translated into the organizational culture through an active and sustained commitment from the management team.

A critical element of this transformation is the development of trust among the company's employees. Leaders need to trust that the people in their organization are making the right decisions when they are given the right tools and information, and employees need to trust that leaders support them in their work and help them grow within the organization. Trust is based on a history of interactions and can be sustained over time by adopting technological systems that facilitate the performance of the activity and generate relevant reports on the fulfilment of the tasks assumed. Some disruptive operating models even include a transition from traditional hierarchies based on rigid and bureaucratic decision-making structures to agile organizational structures in which people within the company are empowered to make decisions and act proactively based on well-defined values and principles.

Fostering a sense of autonomy, responsibility, and meaning encourages employees to be more engaged, and innovative, and make valuable contributions to the organization's development. These contributions can be greatly amplified by promoting a culture of continuous learning, developing digital skills and having access to optimal technological solutions that facilitate rapid decision-making and action.

Moreover, optimization can help companies build a culture of continuous improvement, in which employees are encouraged to identify inefficiencies and suggest changes beneficial to increasing operational efficiency. For maximum value, changes to the processes must be agreed upon with key representatives among the beneficiaries and communication quickly and clearly to the people involved in the execution of these processes.

When addressing the coexistence of autonomy and digitalization in working life, it has been proved that both autonomy and monitoring can increase at the same time, according to Gerten, Beckmann and Bellmann (2018). They found evidence that ICT not only encourages decentralization but also centralization; for example, they found that while ICT led to an increase in autonomy for employees (particularly for those holding larger positions, like managers) it also led to an increase in employee monitoring workforce inside the organization.

As a conclusion, there has been quite some research on the issue of technology and worker autonomy, but the results are not unambiguous. So, we examined whether digitalization leads to greater worker autonomy, greater monitoring, or a combination of the two. This information was used as an underlying basis when building our third hypothesis since the majority of economic studies on ICT's impact on organizations indicate that digitalization fosters worker autonomy.

H1: Digitalization positively influences job satisfaction

Hypothesis 2: 'Digitalization' work/life balance blurs.

Hypothesis 3: Digitalization gives rise to greater worker autonomy

## **Methods**

Information on the sample and data collection

This study was developed by using a quantitative approach. We initially conducted desktop research in which we reviewed the literature.

Depending on our assumptions based on different studies, we created an online questionnaire to explore how digitalization changes work. We created the survey on the IKA (One Click Survey) online platform. We sent the survey via email, Facebook, and LinkedIn. As the survey was mostly distributed via network on the Internet, a convenience sampling method was used among relatives (friends, family members,

## The impact of digitalization on the workplaces

coworkers, etc.). The survey covered the period from January 8, 2025, to January 29, 2025. The sample was students and workers in general, dominantly from Romania. We obtained 98 responses (45% men and 55% women). The majority (78%) were aged 20–41; the next largest group (19%) were people ages 41–60.

There were 11 questions (constructs) in the survey, which consisted of 47 variables (items). The survey average time taken was 5 minutes 41 seconds. The initial one questioned the link of the personal workplace with the digitized assignments. This was expressed using an as-even-point Likert-type scale (1 = almost never, 7 = almost always). We borrowed the question from Salvatori, Menon & Zwysen. (2018). The second, third, and fourth questions had a five-point Likert-type scale (1= strongly disagree, 5 = strongly agree) and assessed the outcomes of digitalization on job satisfaction, workplace and work/life balance, and autonomy of work.

Finally, measures of worker autonomy were based on Peña-Casas, Ghailani and Coster (2018). The fifth and the sixth were ranking different categories from most to least important. With these two questions, we aimed to identify the key barriers to the successful adoption of new workstyles and the most critical drivers of workstyle change. Also at the end were sociodemographic questions regarding gender, age, country of origin, working position and industry. To examine the responses from the collected data, a one-sample t-test was found using the statistical software package SPSS. Using it we compared the mean of each construct (which asked about the relationship between digitization and a unique factor) and the mean of the previous domain scale. All three hypotheses were subjected to a one-sample t-test analysis.

### Results

Descriptive statistics Table 1 presents the descriptive statistics (means, standard deviations, and standard errors of the means) of the primary variables. The sample size is 98 people.

	N	Mean	Standard Deviation	Std. Error Mean
Job satisfaction (H 1)	98	3.6268	0.64204	0.06486
Work/life balance (H2)	98	3.39	1.127	0.114
Worker autonomy (H3)	98	3.3010	0.99933	0.10095

### Hypotheses tests

We conducted a one-sample t-test for the dataset obtained for all three hypotheses. Impact of Hypotheses on Data Distribution. We compared gathered data means for each hypothesis with their scales' midpoint - value 3 (which would represent normally distributed data) and we obtained the following results. The first hypothesis (H1), "Digitalization enhances job satisfaction," which considered digitalization as the dependent variable and job satisfaction as the independent, was accepted ( $t = 9.665$ ,  $p = 0.001$ ). H2: "Digitalization blurs work/life balance" — in which digitalization is the dependent variable and work/life balance is the independent variable — ( $t = 3.405$ ,  $p =$

0.001), we also found significantly different means. Therefore, we confirmed that the work/life balance is blurred by digitalization.

Finally, we confirmed our third hypothesis (H3), “Digitalization promotes more worker autonomy,” where digitalization was the dependent variable and worker autonomy with statistical significance ( $t = 2.982, p = 0.004$ ).



## Conclusion and discussing

The digital transformation of the world we live in is a new phenomenon, but in the same inevitable time, which manifests itself everywhere. However, no one, in any area, has yet reached the final and complete stage, nor has it been able to define digitalization definitively and in unanimously accepted terms. What can be said for sure is that belonging to digital will become even more pronounced in the future, and digital networks will continue to play an important role in this whole process of digitalization, in the lives of people around the world.

According to our survey, we found evidence to support all three of our hypotheses. The first hypothesis that digitalization is good for the employee's job satisfaction was confirmed. This was consistent with our findings and those from previous studies, on digitized workplaces.

We focused on how digitalization transforms workplace autonomy. Various researchers have opposing opinions on it. Some researchers are sure that ICT expands employees' autonomy, while others argue it leads to the stronger control of employees. Moreover, there is evidence that digitalization creates more autonomy and also more monitoring (Gerten, Beckmann & Bellmann, 2018). We conducted this research to establish the case among Romanian employees and avoid going-fetching data of other researchers.

## **The impact of digitalization on the workplaces**

The research supported our third hypothesis as most of the participants were employees of the organization responded that the freedom progressed to the extent of the digitalization of their organizations. This is a reflection that the usage of technology tools in the workplace enables Romanian employees. The explanation for this outcome could relate to the kinds of workplaces in which the workers who took part in our poll are employed. They are primarily international accounting and auditing firms, for which the application of technology tools is vital (for gatherings, correspondence with clients, completing different assignments and so forth). If we did this research with employees of other types of organizations, we might find that we get different answers.

The article highlights the essential transformations generated by digitalization on workplaces, highlighting both the benefits and challenges of this inevitable process. On one hand, the increase in employee satisfaction by making tasks more efficient and increasing autonomy in the workplace confirms the optimistic prospects for digitalization, which demonstrates that the integration of modern technology leads to a more flexible and adaptable work environment. On the other hand, the study also highlights adverse effects, such as blurring the boundaries between work and personal life, a phenomenon that can contribute to increased psychological pressure on employees, calling for concrete measures to maintain work-life balance.

The statistical results show that digitalization has a significant impact on job satisfaction (H1 accepted), which indicates that access to technology and optimization of professional tasks can contribute to a positive organizational climate. At the same time, the validation of the hypothesis that digitalization blurs the work-life balance (H 2 accepted) signals the need for clear strategies for time management and the strict demarcation of professional and personal activities, in particular by establishing organizational policies on the use of technology outside working hours. In terms of employee autonomy (H 3 accepted), the study confirms that digitalization favours both freedom of action and increased monitoring, which suggests that the success of technology implementation depends on the balance between control and trust on the part of employers.

The concrete solutions that derive from this analysis must aim at adjusting management strategies so that digitalization is a catalyst for efficiency and well-being, not a source of stress or excessive control. Thus, companies should invest in well-being programs, which include training for time management and digital disconnection techniques, thus promoting the mental health of employees. It is also essential to adopt flexible policies on remote work, ensuring that increased autonomy does not translate into an excessive burden on employees, but into a real balance between productivity and quality of life. Last but not least, performance evaluation models need to be reconsidered so that digital monitoring is not perceived as a form of intrusive supervision, but as a tool to support professional development, based on clear objectives and constructive feedback.

In conclusion, digitalization is not only a technological process but also a profound transformation of organizational culture, and its success depends on the ability of leadership to integrate it harmoniously into the dynamics of the workplace, balancing efficiency with fundamental human needs.

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The authors contributed equally to this work.

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## Article Info

*Received:* March 26 2025

*Accepted:* May 10 2025

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### **How to cite this article:**

Pîrvu, R. C., Ciurilă (Tapi), C. A. (2025). The impact of digitalization on the workplaces. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 164 – 173.



## ORIGINAL PAPER

# How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector

Cristi Spulbar <sup>1)</sup>, Daniela Iulia Maria Carbune<sup>2)</sup>

### Abstract:

The paper examines the impact of Open Banking and Artificial Intelligence on financial innovation in the Romanian banking industry, underscoring their contribution in enhancing operational efficiency, customer experience, fraud prevention and overall financial performance. By using an analytical approach, the study integrates statistical analysis on digitalization trends within the Romanian banking system and case studies of AI-driven solutions implemented by leading financial institutions. The findings suggest that AI technologies and Open Banking ecosystems contribute significantly to improving banking operations, reducing transaction costs and optimizing resource allocation. Moreover, AI-enhanced user experience and real-time data analytics are expected to boost customer satisfaction, increase financial accessibility and security, while also strengthening fraud detection and risk management measures. From a financial perspective, the integration of AI and Open Banking is projected to optimize financial performance in the banking sector, advance digital transaction volumes and lower operational risks. This research contributes to existing literature by providing empirical insights on the impact of Open Banking and AI on a developing European market. It offers a comprehensive analysis of Romania's banking sector, serving as a reference for similar markets undergoing digital transformation and provides valuable insights for banking institutions, policymakers and fintech stakeholders, particularly in developing economies.

**Keywords:** *Open Banking, Artificial Intelligence, financial innovation, digitalization, Romanian banking sector*

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# **How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector**

## **Introduction**

The advent of Open Banking and Artificial Intelligence (AI) has become a transformative force within the global banking industry. This phenomenon is particularly relevant to the Romanian banking sector, which is characterized by a dynamic shift towards digital financial services. Emerging from the foundational concepts of Open Banking, which empowers third-party providers to access customer financial data through APIs (Application Programming Interface), and the integration of AI technologies, this research seeks to elucidate how these paradigms are driving financial innovation. With the banking landscape of Romania increasingly oriented toward digitalization, understanding these developments is crucial for both practitioners and policymakers. Open Banking not only enhances customer engagement but also paves the way for innovative financial products that satisfy the consumer needs. At the same time, AI facilitates advanced data analytics, enabling banks to improve operational efficiencies and customer experiences through personalized services. The intersection of Open Banking and AI creates a synergistic effect that can lead to reduced transaction costs, enhanced security and superior customer satisfaction. This paper aims to provide an analytical approach into these developments within the evolving financial sector of Romania, setting a foundation for future research and practical applications.

According to Hermawan, S., Khoirunisa, Z., A. and Tejomurti, K. (2023), the Open Banking process enables third-party providers to access financial data of the consumers, with their explicit consent, through an API framework managed by financial institutions. This system involves three essential actors: the consumer, the third-party service provider and the bank. The consumer retains ownership over their financial information, the third-party service provider seeks access to offer tailored financial services and the bank acts as the API provider, facilitating secure data exchange and ensuring compliance with regulatory standards. The data-sharing process begins when the consumer requests a financial service from a third-party provider, such as a fintech company or a payment service. To deliver this service, the third party must access the banking data of the consumer, so it submits a request to the bank. Before granting access, the bank must obtain explicit consent from the consumer. Only after receiving approval does the bank authorize the third party to retrieve and use the necessary financial data. This system reflects the core principles of Open Banking, emphasizing transparency, security and user control over data.

The implementation of Open Banking in Europe is regulated by PSD2 (Payment Services Directive 2), which requires banks to allow third-party providers access to financial data under strict security conditions. This regulation encourages financial innovation while protecting consumer rights and ensuring data privacy.

## **Literature review**

The literature surrounding Open Banking and AI highlights their role in driving innovation within financial services. As outlined by Zeynalova (2024), Open Banking promotes a customer-centric approach by allowing clients to control their data. This shift is crucial for increasing market competition and financial inclusion, as emphasized in Xie and Hu's (2024) comprehensive review, which discusses the potential effects of Open Banking initiatives on the financial landscape. Moreover, research indicates that

integrating AI technologies enhances risk management and enables real-time analytics, further propelling financial institutions to optimize their resources (Broby, 2021).

Additional studies complement this perspective. Babina et al. (2024) provide early empirical evidence that Open Banking facilitates fintech entry into traditional banking markets by reducing information asymmetries and transaction frictions. Similarly, Casolaro et al. (2024) offer a systematic review of the Open Banking literature and conclude that it contributes to better consumer outcomes and improved financial literacy when integrated with intelligent digital platforms.

A deeper examination of the ethical implications of AI in finance reveals challenges such as data privacy and algorithmic bias (Thakur and Sharma, 2024; Cath, 2018). This ethical landscape must be navigated carefully to foster trust among customers and regulatory bodies. Mehdiabadi et al. (2020, 2022) emphasize that AI and Open Banking must be implemented within a strategic digital roadmap, especially in countries with moderate digital maturity, such as Romania, to ensure alignment with regulatory frameworks and technological infrastructure.

Other study indicates that AI applications have demonstrated their potential to analyze user data dynamically, leading to personalized banking services that enhance customer retention (Pham et al., 2024; Gaies, 2023). Furthermore, the reduction in transaction costs attributed to Open Banking practices allows institutions to reallocate resources effectively, fostering further innovation (Shalihin and Safuan, 2021). Moreover, fraud detection mechanisms enhanced by AI technologies have shown significant improvements in identifying suspicious transactions. As financial institutions embrace these technologies, the ability to adapt to customer needs and mitigate risks has become increasingly critical (Hermawan et al., 2023). This responsiveness is essential for maintaining consumer trust and satisfaction, especially in a market where digital transactions are becoming the norm.

Moreover, the dematerialization of banking products enabled by digital transformation is discussed by Hadad and Brătianu (2019), emphasizing that the rise of digital services asks to modern consumer expectations. As banks integrate AI technologies into their operational frameworks, there is considerable evidence pointing towards improved efficiency and service delivery. For instance, AI applications, such as chatbots and automated customer interfaces, have been shown to enhance service accessibility, as discussed by Okeke et al. (2024). In the context of Romania, the banking sector has undergone significant transformation. Ionașcu et al. (2023) emphasize that financial institutions are increasingly embracing digital strategies to maintain their competitiveness in a rapidly evolving market environment.

In the context of Central and Eastern Europe, Wolska (2024) discusses how collaboration between traditional banks and fintechs through Open Banking APIs is accelerating innovation and digital service adoption. This is particularly relevant in Romania, where some banks are already integrating third-party fintech solutions to extend their digital offerings.

Fang and Zhu (2023) analyze the BRICS economies (Brazil, Russia, India, China, and South Africa) and provide evidence that Open Banking contributes to a decline in traditional consumer lending by enabling the growth of alternative credit platforms. These fintech services, powered by API-driven access to financial data, offer personalized lending solutions and challenge incumbent banks. Their findings highlight a shift in consumer behavior and a structural transformation in credit markets, emphasizing the need

## **How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector**

for traditional banks to adopt data-driven strategies and collaborate with fintechs to remain competitive.

Complementing this global perspective, the study conducted by Spulbar et al. (2022) provides valuable insights from the Indian private banking sector, revealing that AI implementation significantly improves operational efficiency and customer satisfaction. Their findings highlight that AI-powered mobile applications, chatbots and personalized recommendation systems are perceived as safe, fast and convenient. Despite the high costs and technical complexity of adoption, both customers and bankers recognize the ability of AI to reduce errors, save time and deliver more transparent banking services. However, the study also notes that digital literacy and staff training remain essential for successful AI integration. These findings from a major emerging market offer important parallels to the Romanian context, where banks are undergoing a similar digital evolution.

The study conducted by Alt et al. (2021) highlights a clear and consistent shift toward personalized banking experiences driven by the integration of AI technologies. Beyond personalization, AI has also become a crucial tool in fraud prevention, offering the ability to process and analyze large volumes of data in real time, which allows banks to identify anomalies and address potential threats proactively.

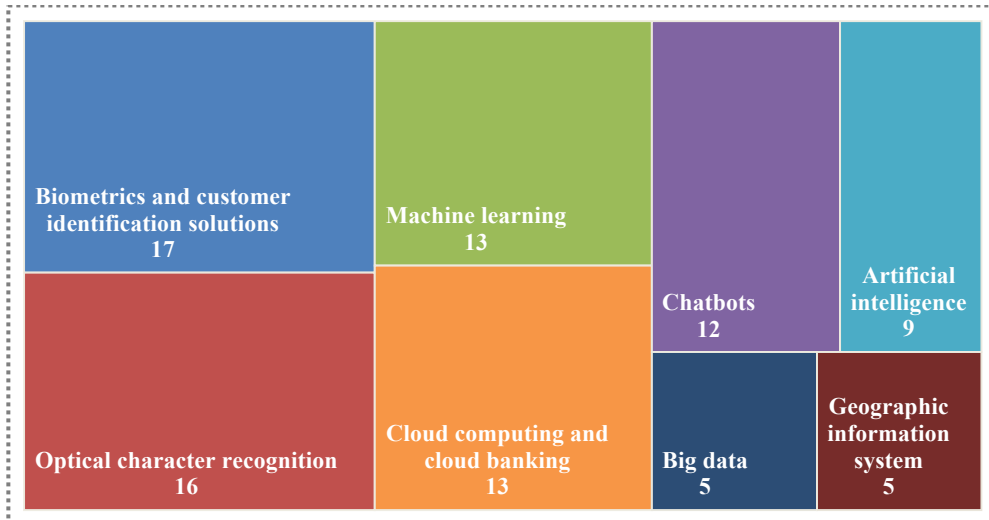
Moreover, Florea et al. (2024) emphasize that the integration of AI into banking decision-making processes has led to a notable reduction in operational risks. These diverse applications of AI not only enhance customer confidence but also contribute to the strengthening of institutional resilience within the Romanian banking sector.

### **Evidence-based analysis of AI and Open Banking in Romanian banking sector**

The adoption of AI has become a race for competitive advantage, where businesses strive to leverage AI-driven benefits such as efficiency gains, innovation facilitation, error minimization and problem-solving capabilities. However, the rapid pace of adoption raises concerns regarding ethical and regulatory challenges, security vulnerabilities and sustainability costs.

According to the information provided in the Financial Stability Report as of June 2024, as we can see in figure 1, in 2024, Romanian banks have adopted various AI-driven technologies to enhance their operational efficiency, security and customer experience. The implementation of these technologies is shaping the banking sector by streamlining processes, reducing costs and enabling data-driven decision-making. The distribution of AI applications across financial institutions highlights the strategic role these technologies play in modern banking.

**Figure 1. Distribution of implemented technologies (number of banks) at 2024 level**



Source: Authors contribution based on data provided by Financial stability report, June 2024 – BNR

Among the most widely adopted AI solutions, biometric and customer identification technologies stand out, with 17 banks implementing systems such as facial recognition and fingerprint scanning to enhance security and simplify customer authentication. Similarly, optical character recognition (OCR) is utilized by 16 banks to automate data extraction from documents, facilitating efficient loan processing, Know Your Customer (KYC) verification and document management.

Additionally, machine learning is deployed by 13 banks to improve fraud detection, assess credit risks and personalize financial services. A similar number of institutions have integrated cloud computing and cloud banking, benefiting from scalable, secure and cost-effective digital infrastructure. Meanwhile, chatbots, adopted by 12 banks, are transforming customer interactions by offering real-time assistance and automating routine inquiries, thereby optimizing customer service efficiency.

More advanced AI applications are also gaining traction, albeit at a slower pace. Artificial intelligence, encompassing algorithmic trading, risk modeling and AI-driven customer engagement tools, has been adopted by 9 banks. Moreover, big data analytics is employed by 5 banks to extract valuable insights into customer behavior, enhance decision-making and develop targeted financial products. Similarly, geographic information systems (GIS), also used by 5 banks, play a crucial role in optimizing branch networks, assessing lending risks and expanding financial services based on geospatial data.

These developments underscore the increasing reliance on AI technologies in the Romanian banking sector, signaling a shift toward automation, enhanced security and improved customer experiences. As financial institutions continue to integrate AI-driven innovations, they are expected to further refine their operational frameworks, strengthen fraud prevention mechanisms and expand access to more personalized banking solutions.

AI and ML technologies are predominantly used for data collection and extraction, risk management, customer evaluation through scoring models, fraud detection

## **How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector**

and anti-money laundering (AML) monitoring. Despite the growing recognition of AI's strategic importance, the integration of AI into corporate governance frameworks remains limited. Notably, 81% of responding banks, representing 97% of the total market share, acknowledge that incorporating AI into their business strategy is essential for long-term institutional success. However, efforts to formally embed AI governance structures within banking frameworks remain underdeveloped.

These findings emphasize the critical role of AI in shaping the future of Romanian financial sector, with increasing adoption rates in fraud prevention, risk assessment and operational efficiency. However, further steps are needed to enhance AI governance and regulatory alignment to ensure the sustainable integration of these technologies.

The adoption of innovative technologies in the Romanian banking sector has seen significant progress, as depicted in Fig. 1. Financial institutions are increasingly integrating AI-driven solutions into their operations, with a particular focus on machine learning (ML), artificial intelligence (AI) and big data analytics. However, blockchain technology remains entirely absent from current implementations.

Among these technologies, machine learning is the most widely adopted technology, used by half of surveyed banks representing 85% of market share, mainly for risk assessment, fraud detection and customer analytics. AI applications are deployed by one-third of banks (68% market share), primarily using Natural Language Processing and Computer Vision to enhance automation and client interaction. Big data analytics, employed by 20% of banks, supports improved decision-making and service personalization. In contrast, blockchain remains unadopted in the Romanian banking sector, reflecting either institutional caution or regulatory constraints despite its global relevance in secure transactions and decentralized finance.

These trends indicate a strong commitment to AI-driven innovation among Romanian banks, yet also highlight a reluctance or lack of regulatory readiness for adopting blockchain-based solutions in financial operations.

This study explores the synergistic role of Open Banking and AI in driving financial innovation within the Romanian banking sector. As evidenced by the wide adoption of AI-driven solutions, financial institutions are actively leveraging biometric authentication, machine learning and cloud banking to optimize efficiency and enhance customer experience.

Furthermore, Open Banking, enabled through the PSD2 Directive in Europe, fosters a competitive and innovation-driven ecosystem, where third-party financial service providers integrate AI-powered solutions for real-time data analytics, fraud prevention and personalized banking services.

By correlating Open Banking with AI adoption trends, this study highlights how Romanian banking sector is gradually embracing digital transformation despite lower-than-average AI adoption rates in the broader economy. The insights drawn from this analysis serve as a valuable reference for banking institutions, policymakers and fintech stakeholders aiming to accelerate AI-driven Open Banking solutions in developing financial markets.

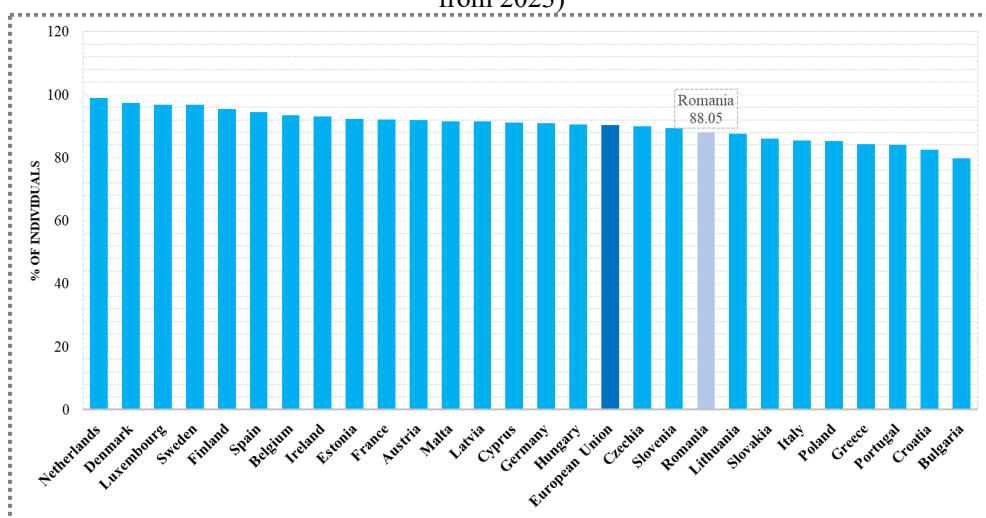
The internet use indicator (Figure 2) reflects how digitally connected and engaged the population is. As of DESI 2024, 88.05% of Romanians use the internet at least once a week, a notable increase compared to previous years (~70% in 2018-2019). This steady growth provides a fertile ground for banks to deploy and scale digital financial innovations, such as AI-driven chatbots and virtual assistants, personalized financial

insights powered by machine learning and Open banking APIs for account aggregation and instant payments. A broader and more consistent internet user base facilitates higher adoption and acceptance of these services.

Although this figure reflects a relatively high level of digital engagement, it remains below the EU average of 90.27%.

The performance of Romania places it in the lower third among EU Member States, indicating that a notable portion of the population is still not regularly engaged in digital activities. While the gap compared to the European average is modest, it nonetheless points to underlying structural challenges, such as limited digital skills, socio-economic disparities and varying levels of access to reliable internet infrastructure, especially in rural and underserved areas.

Figure 2: Internet use, all individuals (aged 16-74), DESI period: 2024 (data from 2023)



Source: Authors contribution based on data provided by Digital Decade DESI visualisation tool, European Commission website

The Romanian banking sector has been undergoing rapid digital transformation in recent years. According to the Financial Stability Report published by the National Bank of Romania in December 2024, information technology (IT) expenditures incurred by credit institutions have registered a significant increase of 53% compared to December 2020. This upward trend reflects the intensification of digitalization efforts within the banking sector, alongside a growing emphasis on mitigating cyber threats.

A considerable number of small and medium-sized banks have notably accelerated their investments in enhancing IT infrastructure and implementing advanced cybersecurity solutions. As of September 2024, outsourced IT services represented, on average, approximately one-third of the total IT expenditure across the sector. Notably, over 80% of these outsourced services were attributed to large banking institutions, indicating their substantial reliance on external technological support.

The success of these AI technologies and Open Banking depends on consumer readiness, which in turn is strongly influenced by internet usage. In this way, we can

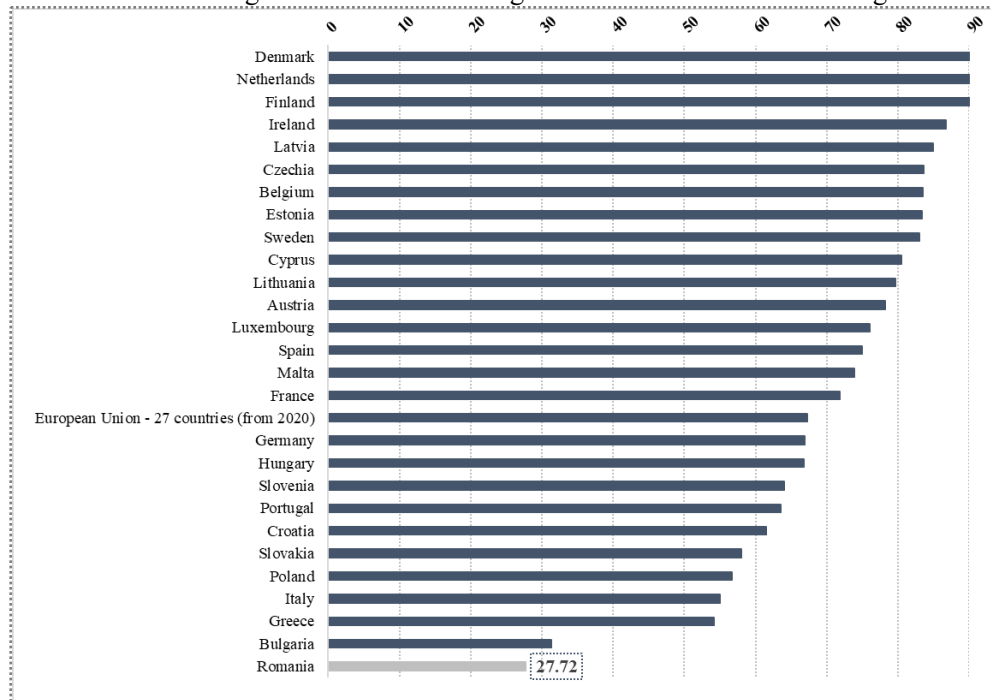
## How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector

identify a positive correlation between increased internet use and the adoption of AI and Open Banking services, as follows:

- increased internet penetration (88.05%) has made consumers more comfortable interacting with digital platforms, creating the demand for 24/7 AI-powered services and app-based banking solutions;
- the expansion of online banking and mobile apps is both a result of and a catalyst for rising internet usage;
- Open Banking models rely heavily on customer consent and digital interaction. Higher digital literacy and internet access increase the likelihood that consumers will share data securely via Open APIs.

In order to summary the aspects mentioned above, as internet usage increases, banks have greater incentives to invest in AI and Open Banking technologies, knowing that a digitally engaged population is more likely to use them.

Figure 3: Individuals using the internet for internet banking



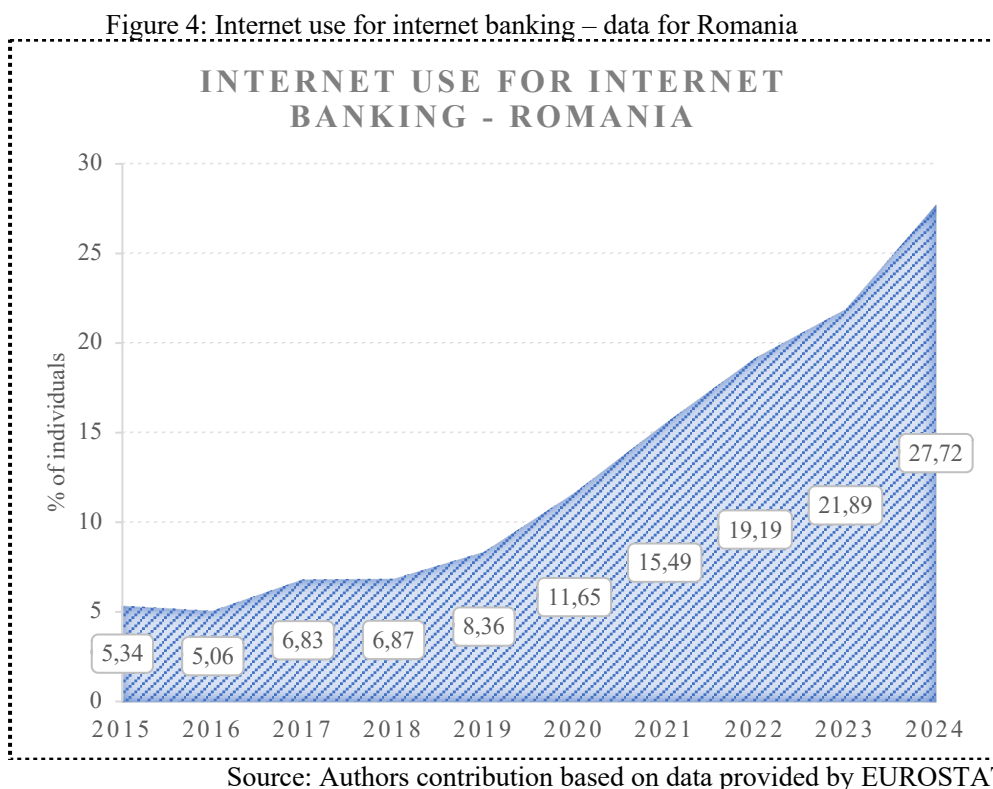
Source: Authors contribution based on data provided by EUROSTAT

The figure 3 represents the percentage of individuals in each EU country who used the internet for internet banking in 2024. The indicator is part of the Information Society statistics and provides insights into the digital adoption of financial services across the EU.

Romania ranks last among all EU Member States, with an internet banking usage rate of just 27.72% of individuals. This is significantly below the EU average, which is well above 60% in most countries.

Figure 4 reveals that, although Romania ranks last among all EU Member States, the country has experienced a steady and notable upward trend over the past decade.

Despite its current position at the bottom of the EU ranking, with only 27.72% of individuals using internet banking services, Romania has made important progress compared to 2015, when the usage rate was just 5.34%. This consistent growth highlights an ongoing digital transformation process within the Romanian financial sector and suggests that, while the country still faces challenges in digital financial inclusion, it is steadily moving in the right direction.



According to the Financial Stability Report published by the National Bank of Romania (June 2024), digital access to banking services expanded significantly in 2023, with notable growth in user adoption and transaction volumes, particularly for domestic payments and transfers. The increasing use of mobile banking apps and digital wallets (e.g. Apple Pay, Google Pay) reflects a shift toward digital financial behavior, aligning Romania with broader European digitalization trends. However, traditional banking practices, including POS card use, ATMs and cash transactions, remain dominant. This gradual digital transition is hindered by structural barriers such as an ageing population, low digital literacy, Romania ranks last in the EU's DESI digital skills index and unequal access to financial services across regions and socio-economic groups.

Given these conditions, it is expected that banks in Romania will maintain a balanced approach, ensuring continued access to non-digital banking services. This is essential to prevent financial exclusion, particularly among vulnerable groups, as the country advances toward greater digitalization. Ensuring inclusivity in this transformation process remains a key priority for the sustainable development of the financial sector.

## How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector

In this context, the following section of the article presents a ranking of the top 10 banks in Romania, based on the total value of their assets. This analysis will serve as the foundation for selecting the top three banks from the ranking, with the aim of examining the AI and Open Banking solutions they have implemented as part of their digital transformation strategies and efforts to adapt to the evolving demands of the financial market.

Table 1. Top 10 credit institutions in Romania by assets

Rank	Bank	Assets S1/ 2024 (bn. Lei)	Market share (% of total assets)
1	Banca Transilvania	169.00	20.25
2	BCR	111.00	13.30
3	CEC Bank	93.00	11.14
4	BRD	84.00	10.06
5	ING	76.00	9.11
6	Raiffeisen Bank	74.00	8.87
7	Unicredit	68.00	8.15
8	Exim Banca Românească	27.00	3.24
9	Alpha Bank	23.00	2.76
10	OTP Bank	19.00	2.28

Source: Authors contribution based on data provided by zf.ro, bnr.ro and banks website

Based on the data for the first semester of 2024, the top 10 credit institutions in Romania collectively dominate the banking market, with significant differences in total assets and market share.

Banca Transilvania leads the Romanian banking market with assets of 169 billion lei (20.25% market share), followed by BCR with 111 billion lei (13.3%) and CEC Bank with 93 billion lei (11.14%). These top three institutions have made substantial investments in digital transformation, AI, and Open Banking. BRD, ING, Raiffeisen and Unicredit also maintain strong market positions, while other banks account for smaller shares under 4%.

Given the dominance of Banca Transilvania, BCR and CEC Bank, we have chosen to analyze a part of their Open Banking and AI solutions. These institutions, as the top three players, have significant digital transformation strategies, investments in innovative technologies and extensive customer bases that allow them to leverage Open Banking and AI for enhanced financial services.

To assess the level of digitalization of a bank, a relevant indicator is the proportion of digitalized clients relative to the total customer portfolio.

In its Preliminary Financial Results Report for 2024, Banca Transilvania reports that 95% of its 4.6 million active clients are digitalized. Recognized by Brand Finance as the top banking brand in Europe and third globally, the bank exemplifies strategic innovation. It was the first in Romania to implement large-scale AI, notably through BT Pay's virtual assistant Chat BT and the Azure OpenAI-powered, Ask BT platform.

According to the same source, Brand Finance, BCR and BRD have advanced by 44 and 28 positions in the Banking 500 ranking, highlighting their strategic initiatives to

strengthen their market presence. This progress also underscores the resilience and increasing competitiveness of the Romanian banking sector on the global stage.

In the context of its strategic commitment to digital transformation, BCR has reported significant progress in the adoption of AI-based technologies and Open Banking solutions, as outlined in its Financial Results Report as of December 31, 2024. The digital strategy of BCR centers on the George ecosystem, with 2.53 million users and 2.16 million active mobile users as of 2024. George supports product onboarding, bill payments and AI-driven guidance through tools like George SmartEU and chatbot ADA. In business banking, BCR enables over 160,000 companies via George for Businesses, with high digital onboarding rates and automated credit processing.

Complementing this is Finqware, a Romanian Open Banking platform integrated with Banca Transilvania and CEC Bank, allowing clients to access and initiate transactions across multiple banks within one app. This integration supports a seamless, multi-bank user experience aligned with Open Banking principles.

### **Conclusions**

The research highlights the transformative impact of Open Banking and Artificial Intelligence (AI) on the Romanian banking sector, offering compelling evidence that the integration of these technologies significantly contributes to financial innovation, operational optimization and enhanced customer experiences. Open Banking, regulated by the PSD2 Directive, serves as a foundational framework that enables secure, consent-based data sharing between banks and third-party providers, thus fostering competition and driving the development of customized, user-centric financial services.

Simultaneously, the integration of AI technologies, ranging from machine learning and chatbots to biometric authentication, cloud computing and big data analytics, is redefining operational efficiency, service personalization and risk management. The implementation of AI across Romanian banks has led to measurable reductions in transaction costs, improved fraud detection mechanisms and enhanced decision-making capabilities through real-time analytics.

While Romania still lags behind other EU Member States in terms of digital financial inclusion, as evidenced by relatively low internet banking usage rates, the steady growth trend in internet adoption, particularly for financial services, signals a positive trajectory toward digital maturity. This upward trend provides fertile ground for the scaling of AI-driven and Open Banking innovations, which are further supported by growing IT investments within the sector.

Moreover, the study reveals that leading financial institutions such as Banca Transilvania, BCR and CEC Bank are at the forefront of the digital transformation. Through its innovations, Romanian banks demonstrate a growing capacity to leverage AI and Open Banking for improved competitiveness, personalization and financial accessibility.

Synthesizing the key points, the synergistic implementation of Open Banking and AI not only drives financial innovation in the Romanian context but also serves as a scalable model for other developing markets. The findings contribute valuable analytical and statistical insights to academic literature and offer practical implications for policymakers, financial institutions and fintech stakeholders committed to advancing digital transformation in banking systems worldwide.

# How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector

## Authors' Contributions

The authors contributed equally to this work.

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## How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector

<https://brandfinance.com/press-releases/banca-transilvania-remains-worlds-third-strongest-bank-brand-in-new-global-ranking>  
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### Article Info

*Received:* May 09 2025

*Accepted:* May 25 2025

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#### How to cite this article:

Spulbar, C., Carbune, D. I. M. (2025). How Open Banking and AI Drive Financial Innovation: Evidence from the Romanian Banking Sector. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 174 – 187.



## ORIGINAL PAPER

# Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis

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### Abstract:

When it comes to providing education to students from different cultural backgrounds, university instructors play a crucial role. To provide outstanding cross-cultural learning opportunities in the classroom, cultural intelligence must be used. The purpose of this study is to investigate how cultural intelligence (CQ) affects university instructors' job performance. Teachers at universities are responsible for creating an inclusive learning atmosphere where students from all backgrounds feel respected and understood, in addition to teaching content. In order to effectively traverse cultural differences, adapt instructional tactics, and engage with students from diverse cultural backgrounds, educators must possess cultural intelligence. Furthermore, investigating how cultural intelligence affects work performance might further our understanding of cross-cultural management and educational leadership. Within the cohort of university professors, regression analysis utilizing Smart PLS was utilized to investigate the relationship between cultural intelligence and work performance. The findings show that among university instructors, cultural intelligence significantly and favorably affects how well they perform on the job. This implies a relationship between university instructors' work effectiveness and their degree of cultural intelligence. Furthermore, these results highlight the significance of cultural competence in improving overall job efficacy and performance in the education sector.

**Keywords:** Cultural Intelligence, Job Performance, Job Efficacy, Educational Leadership, University Professors

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## **Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis**

### **Introduction**

Friedman (2005) highlights the need for a fundamental transformation in the way we prepare our kids to flourish in an interconnected society due to the changing global landscape. Researchers and educators alike must place a high priority on helping students acquire the knowledge and skills necessary to participate successfully in the global community. This means giving students the skills they need to negotiate the complexity of today's interconnected society, including critical thinking, digital literacy, cross-cultural competency, and communication ability. In addition, developing empathy and cultural sensitivity, encouraging collaborative problem-solving, and cultivating an awareness of global issues are all essential elements in preparing students for leadership and active engagement in a fast changing global setting. Darling-Hammond (2010) asserts that addressing the varied needs and backgrounds of our children in the classroom is the first step towards establishing the fundamental work of advancing social justice and equity. Children can get a sense of value and belonging not just in their classrooms but also in their communities and the larger global society by being given the tools to understand the importance of their voices and the richness of their cultural heritage. This acknowledgement makes students feel more included and elevates them as valuable members of the international society.

Teachers now face a wider range of issues as they work with an increasingly diverse student body that is both culturally and linguistically varied (CLD). The various interpersonal and intrapersonal demands of every student in the classroom present teachers with a new challenge in addition to meeting academic and institutional responsibilities. The importance of teachers understanding their students' linguistic needs is underscored by the growing availability of teacher-training materials for public school educators that focus on efficient methods of instruction for culturally and linguistically diverse (CLD) students integrated into their classrooms. Furthermore, these resources support educators taking on new duties as "cultural brokers" and "cultural mediators." These concepts refer to teachers that have a thorough awareness of several cultural systems, the ability to decipher symbols in a variety of cultural contexts, the talent to mediate cultural conflicts, and the ability to build cross-cultural linkages that improve the learning process.

There is an increasing requirement in teacher preparation programs that educators foster "socio-cultural consciousness." This entails having an awareness that directs their interactions with pupils, understanding that the socio-cultural backgrounds of both the educators and the students influence these relationships. In essence, educators are urged to recognize that their experiences and cultural backgrounds shape their viewpoints (Banks et al., 2005). It is expected of teachers to advocate for the needs of their pupils and seek to close the achievement gap (Banks et al., 2005). Teachers working with culturally and linguistically Diverse (CLD) children may find it difficult to distinguish between the cultures of their pupils and the school if they lack cultural awareness, according to Quintanar-Sarellana's (1997) survey inquiry. Alternatively, they may reject their pupils' cultures subtly or, unfortunately, sometimes outright. According to Alexander and Schofield (2006ab), teachers' implicit preconceptions about their students usually lead to the students' unfulfilled academic demands. On the other hand, educators that exhibit cultural awareness typically have a deeper understanding of their students, successfully incorporate their cultures into the classroom, and are more willing to try out new teaching methods in order to improve student learning. Moreover, educators who demonstrate cultural sensitivity are more likely to take an active role in personal and professional

development initiatives that aim to strengthen relationships with these students (Quintanar-Sarellana, 1997).

Two major issues have dominated recent research on cultural intelligence. First, there has been talk on how workplaces are changing, with people pointing out that there are fewer monocultural companies and more multicultural settings in modern workplaces (e.g., Guðmundsdóttir, 2015; Desmond and Desmond, 2016; Adekunle and Ibitayo, 2014). These studies frequently include anecdotal evidence emphasizing the value of cultural intelligence in helping staff members negotiate the challenges brought on by cultural diversity in these kinds of organizations. Examining how cultural intelligence affects foreign workers' performance has been the subject of more research (e.g., Livermore, 2011; Adam and Friend, 2014; Sanders, 2019; David and Rowe, 2017). This corpus of research suggests that culturally intelligent expats typically perform at higher levels. Nevertheless, the focus of both study streams has been on general assessments of cultural intelligence, ignoring the complex character of the skill. This study focuses on investigating the effects of the four dimensions of cultural intelligence—behavioral, cognitive, motivational, and metacognitive—on the job performance of academic staff in a few chosen higher education institutions in India.

## **Review of Literature**

### ***Cultural Intelligence***

Theories and research on emotional and social intelligences gave rise to the concept of cultural intelligence (CQ). But earlier studies on these types of intelligence did not take into enough consideration the complexities of working in cross-cultural contexts (Van Dyne et al., 2008). Earley, Ang, and Van Dyne (2008) identified this gap and developed the idea of CQ to address the ignorance of culturally impacted decision-making and behavioral differences in different types of intelligence. Cultural intelligence (CQ) was defined by Ang et al. (2007) as the ability to recognize and react to novel patterns in cross-cultural encounters. According to Ang et al. (2007), cultural intelligence is a unique type of intelligence that is focused on the capacity to understand, evaluate, and adjust to a variety of situations that are characterized by cultural diversity. This multifaceted idea promotes better relationships and coexistence with people from different cultural backgrounds while also facilitating ongoing learning. It consists of four aspects of intelligence: motivational, which captures people's desire to learn and function well in a variety of contexts; behavioral, which is defined by the adaptability to display appropriate behaviors when interacting with people from different cultural backgrounds; metacognitive, which indicates that individuals are cognizant of interacting with people from different cultures; and cognitive, which represents the particular understanding of rules, customs, and norms in unfamiliar cultural settings (Livermore, 2011). While motivation, metacognition, and cognition are mental processes, conduct takes the form of visible deeds.

### ***Metacognitive Cultural Intelligence ( MetCQ)***

The ability to obtain and interpret cultural knowledge is a component of metacognitive CQ (Ang et al., 2015). To put it simply, metacognitive CQ is the capacity to evaluate and modify commonly held cross-cultural presumptions, helping people become more conscious of their own cultural prejudices before and during interactions between cultures (Eisenberg et al., 2013). People with a high metacognitive CQ, according to Triandis (2006), have a better awareness of how their own culture affects how they behave and perceive situations involving people from different cultures. This

## **Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis**

comprehension includes situational awareness, interpersonal awareness, and self-awareness (Triandis, 2006).

To comprehend the essence of metacognitive CQ, particular self-regulated mental processes are highlighted, including planning, awareness, and checking. Planning involves a strategic approach initiated before engaging with another culture, encompassing reflection and consideration of actions prior to their execution. Awareness entails real-time understanding of cultural perspectives and knowledge of oneself and others (Chen, Wu, and Bian, 2014). Planning requires conscious awareness, whereas awareness is the degree to which people understand in the moment how culture affects their own and other people's thoughts and actions when interacting across cultural boundaries. Checking involves examining presumptions and modifying mental models in response to unexpected events. Comparing the expected and actual results of intercultural communication is the method's approach. Those with high metacognitive CQ are encouraged by each of the three sub-dimensions to prepare ahead of time, consider the circumstances during the actual contact, and modify their actions accordingly.

### ***Cognitive Cultural Intelligence (CogCQ)***

Acquiring in-depth knowledge about civilizations and their variations is a prerequisite for cognitive CQ. People learn how the system structures relationships and behavioral patterns within a culture and why these behaviors differ in various cultural situations by seeing the elements that make up the cultural environment (Ang and Van Dyne, 2008). This knowledge includes context-specific as well as generic cultural information. Understanding the essential elements present in a cultural context is known as culture-general knowledge (Ang and Van Dyne, 2008).

It offers a basic framework for thinking through different approaches to analyzing and understanding the similarities and differences between other civilizations. Conversely, context-specific knowledge entails knowing in-depth details about how cultural traits appear in a certain setting in addition to procedural knowledge about how to move around that setting successfully. Particular subcultures may arise in a variety of settings, including business, diplomatic efforts, peacekeeping operations, higher education, or demographic subgroups defined by variables like age, gender, and level of education. To succeed in their positions, people working in multicultural higher education institutions must have deep cultural understanding of the customs and expectations of various subcultures. While context-specific information refers to an insider's understanding of how to function in a particular setting, culture-general knowledge draws larger analogies across cultures and is based on the understanding and comparisons of an outsider (Morris, Kwok, Ames, and Lickel, 1999).

### ***Motivational Cultural Intelligence (MotCQ)***

The ability to concentrate attention and energy on understanding and functioning well in culturally varied environments is a key component of motivational CQ. According to Stanley and Davis (2019), these motivating skills help people control their thoughts and actions, which make it easier to accomplish their goals. The expectancy-value theory of motivation states that two things influence the direction and amount of effort put into a task: the importance of completing the goal and the belief in its attainability (Du Plessis, 2011). People with high motivational CQ focus their attention and energy on cross-cultural settings because they are naturally curious and confident in their capacity to successfully negotiate cultural obstacles (Guðmundsdóttir, 2015).

### ***Behavioral Cultural Intelligence (BehCQ)***

The capacity to exhibit appropriate verbal and nonverbal behaviors when interacting with people from other cultures is known as behavioral cultural quotient (BQ). This includes speech acts, non-verbal conduct, and verbal behavior as sub-dimensions (Van Dyne et al., 2012). Verbal behavior includes the ability to modify speech delivery, such as speech tempo, tone, warmth, and enthusiasm levels, as well as the use of pauses and silences. Nonverbal conduct acknowledges that certain cultures rely more on nonverbal clues than others and refers to the flexibility in communicating through gestures, facial expressions, and body language. It might be difficult for those who are not from a certain culture to learn acceptable nonverbal communication techniques through metacognitive CQ and modify their conduct accordingly.

### ***Job Performance***

According to Du Plessis (2011), job performance is defined as the total expected value added to a company resulting from the particular behavioral actions a worker does over a regular period of time. An organization's goals and mission, as well as its views, on which behaviors are most important, all have an impact on the qualities of job performance inside that organization (Adam and Friend, 2013). Task performance and contextual performance, are the two primary categories into which job performance can be divided.

Task performance, or TaskPerf, is the set of activities that are officially acknowledged in the incentive system; these tasks usually pertain to the fundamental technical elements listed in job descriptions (Rotundo and Sackett, 2002). It entails carrying out the duties specified in the employment agreement between the employer and the worker. Task performance is a complex idea that is important to the company and the worker. Fulfilling the assigned responsibilities enhances workers' self-esteem and results in greater workplace contentment (Edwards, Bell, Arthur, and Decuir, 2008). Moreover, task performance explains differences in favorable work-related outcomes for workers, like career advancement (Adebayo, 2019). On the other hand, task performance is regularly rated by managers as being very important to overall work performance, highlighting its role in promoting organizational success (Rotundo and Sackett, 2002). General mental ability has been shown in earlier studies to be a good indicator of task performance (Schmidt and Hunter, 2004). Furthermore, it has been found that the non-cognitive characteristic conscientiousness predicts variations in the task performance levels of employees (Kamdar and VanDyne, 2007).

It's not always enough for people to meet the statutory criteria of their jobs; they frequently need to go above and beyond them (Henderson, 2020). Behaviors that support the organizational, social, and psychological environments but aren't specifically mentioned in job specifications or schedules are included in contextual performance (Akpan, Okwudu, and Imagha, 2021). In contrast to task performance, contextual performance refers to those actions that support task performance but aren't explicitly listed in the job description. Nevertheless, they still help the organization function more effectively. Previous studies have distinguished between two types of contextual performance: proactive contextual performance and stabilizing contextual performance (Sonnentag et al., 2010). Organizational citizenship and other pro-social characteristics of organizational behavior are included in the concept of stabilizing contextual performance (ConPerf) (Organ, 1988; Brief and Motowidlo, 1986). Altruism, conscientiousness, civic virtue, civility, and sportsmanship are its five constituents (Akpan, Okwudu, and Imagha, 2021). Proactive contextual performance, on the other hand, involves proactive conduct,

## **Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis**

taking the initiative, and using personal initiative. Proactive conduct is taking future-focused, self-driven steps to improve the existing state of affairs and challenge the status quo (Van Dyne et al., 2012). Contextual performance is, in essence, a multifaceted construct rather than a single set of behaviors (Van Dyne et al., 2012).

### ***Cultural Intelligence and Job Performance***

Metacognitive cultural intelligence, cognitive cultural intelligence, motivational cultural intelligence, and behavioral cultural intelligence are some of the dimensions that comprise the multifaceted idea of cultural intelligence. A person who is culturally intelligent gains from being exposed to a variety of behaviors displayed by individuals from other cultures while maintaining their individuality when interacting with people from different cultural backgrounds.

Cultural intelligence (CQ) and job performance have been found to be correlated in a number of research (Jyoti and Kour, 2015). Jyoti and Kour (2015) posit that people who have difficulties in diverse cultural situations frequently do so because they are unable to understand how cultural variations impact role expectations. Many other researchers, such as Ang et al. (2007), Lee and Sukoco (2010), and Assam and Emele (2020), share this viewpoint and claim that CQ has a major impact on job performance. These findings demonstrate that people with behavioral CQ—behavioral CQ—who are able to modify their behavior in response to their environment and have a higher level of awareness of their surrounds are better able to comprehend and perform roles that are appropriate for their culture.

Cultural intelligence has also been connected to a number of advantageous outcomes in the workplace, including higher creativity and innovation, better communication, and better teamwork. Furthermore, people with higher CQ are frequently better at collaborating and negotiating across cultural boundaries, which enhances organizational performance and helps them succeed in international markets. As a result, firms that operate in increasingly diverse and linked environments might profit greatly from pursuing the growth of cultural intelligence within their workforce. Higher cultural intelligence individuals have a more accurate understanding of the expected role behavior in culturally heterogeneous contexts (Dennis and Fred, 2019). Similarly, there is a positive association between job performance and behavioral and motivational CQ (Assam and Emele, 2020). A person with cultural intelligence is skilled in interacting and comprehending others from different backgrounds, which enhances performance.

Furthermore, having intercultural competences ought to reduce misinterpretations of job expectations and enhance performance. In light of the aforementioned, it is projected that employee task and contextual performance will be impacted by metacognitive cultural intelligence, cognitive cultural intelligence, motivational cultural intelligence, and behavioral cultural intelligence. In particular, it is anticipated that job performance and cultural intelligence will positively correlate.

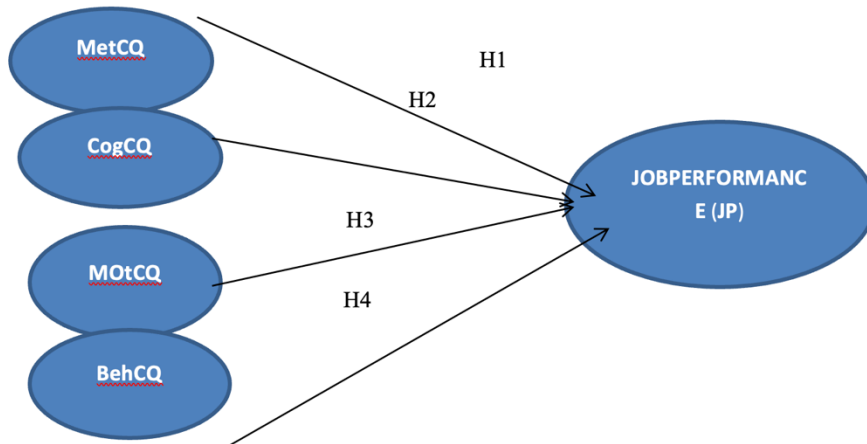
### **Hypothesis**

**H1:** Metacognitive CQ has a positive significant impact on Job Performance of university teachers

**H2:** Cognitive CQ has a positive significant impact on Job Performance of university teachers.

**H3:** Motivational CQ has a positive significant impact on Job Performance of university teachers.

**H4:** Behavioral CQ has a positive significant impact on Job Performance of university teachers



**Figure 1: Conceptual Model**

## **Methods**

### ***Participants and setting***

Volunteers for this study included 200 university teachers from private Indian universities that are well-known for enrolling large numbers of international students. A list of possible applicants gathered from these universities' websites served as the basis for the participant selection process. First, a request for voluntary participation in the study was sent by email to each institution's university teachers. A total of 400 educators were invited to participate in the study, and 315 educators responded. Once duplicate responses and incomplete surveys were removed, 200 participants' data were chosen for examination.

### ***Measures***

The four components of cultural intelligence behavioral, cognitive, motivational, and metacognitive were examined in this study. A total of 20 items from scales derived from Ang et al. (2007) were used to study these dimensions. Nevertheless, certain items were eliminated from the study since they were deemed irrelevant after experts were consulted.

Koopmans (2014) created this questionnaire, which is used to assess worker performance. After consulting with experts, elements deemed unnecessary were removed from the Job Performance Questionnaire (JPQ), which had eighteen questions at first. A 5-point Likert scale was used to formulate each issue; 1 meant "strongly disagree," and 5 meant "strongly agree."

### ***Procedures***

The identified participants received an email invitation to take part in an online survey. The questionnaire included questions about informed consent, demographics, cultural intelligence (CQ), and job performance (JP). Participants could use it from late November 2023 until December 2023. Further emails serving as reminders were sent to university instructors who had not yet replied. This methodology was adapted from Dillman's (2007) recommended approach.

## Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis

### *Research design and analysis*

The study investigated the effect of cultural intelligence on university instructors' job performance using a descriptive research technique. The study utilized partial least squares structural equation modeling (PLS-SEM) to analyze the data. Through SmartPLS Version 4.0, the analysis involved two main stages: evaluating the measurement model and analyzing the structural model. In assessing the measurement model, the focus was on examining convergent and discriminant validity. Convergent validity gauges the degree of interconnectedness among items within constructs, while discriminant validity assesses the extent of differentiation among items across constructs.

In order to evaluate the structural model, the study's methodology mostly focused on looking at the suggested links between the constructs. Examining the collinearity, importance, and applicability of the relationships in the structural model was part of this assessment. To gain a deeper understanding of the model's performance, the assessment also involved examining variables including the coefficient of determination ( $R^2$ ), effect size ( $f^2$ ), and predictive relevance ( $Q^2$ ).

### **Findings**

#### *Measurement model assessment*

Table 1 shows the metrics that were used to evaluate the measurement model, including factor loading, composite reliability (CR), and average extracted variance (AVE). Although values as low as 0.4, 0.5, and 0.6 may be acceptable in certain situations, a factor loading of 0.700 is generally regarded as typical (Ramayah, Cheah, Chuah, Ting, & Memon, 2018). Some items were in Cultural Intelligence scaled deleted (BEH2 and MOT1) due to very less factor loadings. The benchmarks for AVE and CR are 0.5 and 0.7, respectively, and Table 1's results show that all of these requirements have been satisfied. This suggests that the convergent validity of the measurement model is acceptable. The SmartPLS output of the measurement model evaluation is shown in Figure 2.

**Table 1 .Factor loading, composite reliability and average variance extracted**

	Item Code	Factor Loadings	Composite Reliability (CR)	Average Variance Extracted (AVE)
<b>Behavioral</b>	BEH1	0.74	0.744	0.565
	BEH3	0.759		
	BEH4	0.771		
<b>Cognitive</b>	COG1	0.688	0.822	0.517
	COG2	0.665		
	COG3	0.799		
<b>Meta-Cognitive</b>	MET1	0.794	0.771	0.682
	MET2	0.854		
	MET3	0.828		
<b>Motivation</b>	MOT2	0.914	0.987	0.689
	MOT3	0.753		
	MOT4	0.832		
<b>Job Performance</b>	CP	0.906	0.789	0.825
	TP	0.911		

Henseler, Ringle, and Sarstedt (2015) supported the use of the heterotrait–monotrait correlation ratio (HTMT) as a criterion for assessing the measurement model's discriminant validity. A criterion of 0.9 was proposed by Gold, Malhotra, and Segars (2001); however, Kline (2011) recommended that it not exceed 0.85. All of these requirements were met, according to Table 2, suggesting that the measurement model did in fact demonstrate discriminant validity.

**Table 2 .HTMT assessment of discriminant validity**

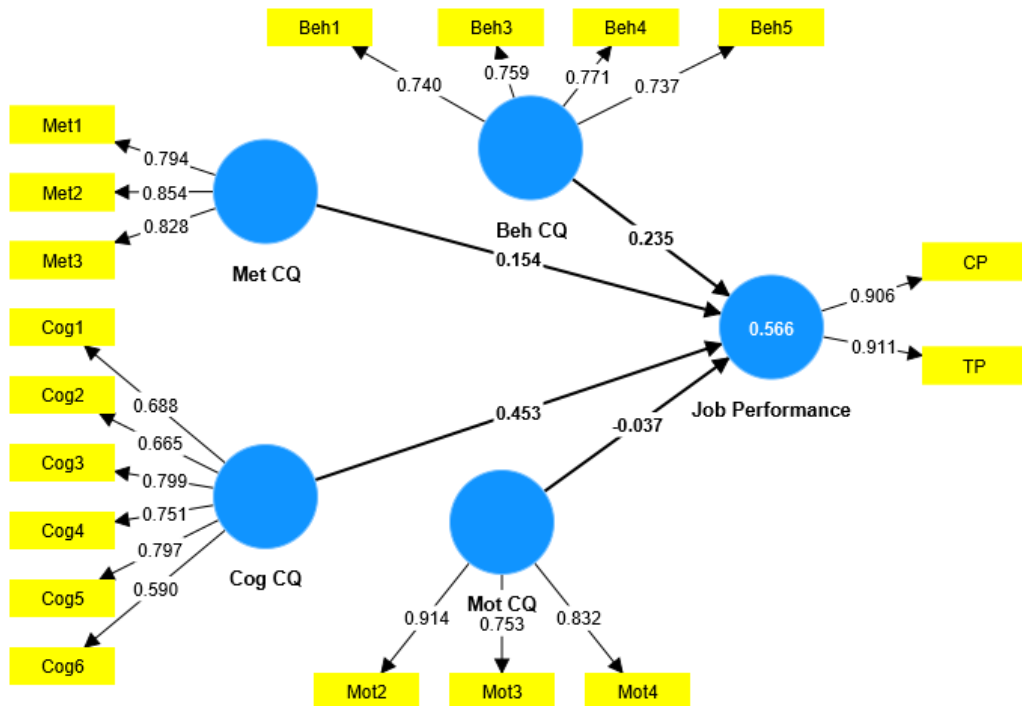
	Behavior	Cognitive	Job Performance	Meta-Cognitive	Motivation
Behavior					
Cognitive	0.821				
Job Performance	0.813	0.789			
Meta-Cognitive	0.723	0.513	0.738		
Motivation	0.172	0.166	0.714	0.137	

### ***Structural model assessment***

The Variance Inflation Factor (VIF) was used to determine whether multicollinearity existed in the model. All VIF values were comfortably below 3.3, which suggest that multicollinearity problems were not present in the model (Diamantopoulos & Siguaw, 2006). The results from Table 3, which were obtained by bootstrapping the structural model analysis, show that when  $p < 0.001$  ( $t > 1.645$ ),  $p < 0.05$  ( $t > 1.96$ ), or  $p < 0.001$  ( $t > 2.58$ ), the hypotheses are supported. The findings clearly show that every hypothesis is supported. Furthermore,  $R^2$  must be at least 0.35 for significance, per Cohen (1988), and the computed model for this study's  $R^2$  of 0.566 is considered significant.

A blindfolding procedure with a distance omission of  $D = 7$  was used to evaluate the predictive significance. PLS-SEM analysis criteria are well-aligned with the  $Q^2$  value computation, which is based on a cross-validated redundancy technique (Hair, Thomas, Hult, Ringle, & Sarstedt, 2017). According to the data, all endogenous factors have predictive importance, as indicated by the  $Q^2$  value of 0.541. The degree to which an endogenous variable influences an exogenous variable is referred to as its effect size. According to Cohen (1988), an  $f^2$  value of 0.35 or higher indicates a large influence,  $0.15 < f^2 \leq 0.349$  indicates a moderate effect, and  $f^2 \leq 0.03$  indicates a modest effect. Every connection shows either a minor or moderate effect size, based on the results shown in Table 3.

## Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis



**Figure 2. SmartPLS output of the measurement model.**

**Table 3. Results of path analysis, VIF,  $f^2$ ,  $R^2$  and  $Q^2$**

Column1	Original sample (O)	Sample mean (M)	Standard deviation (STDEV)	T statistics ( O/STDEV )	P values	VIF	$f^2$	$R^2$	$Q^2$
Behavior - > Job Performance	0.235	0.234	0.073	3.229	0.001	1.912	0.037	0.566	0.541
Cognitive - > Job Performance	0.453	0.453	0.073	6.233	0.000	2.228	0.212		
Meta-Cognitive -> Job Performance	0.154	0.154	0.066	2.344	0.019	1.763	0.031		
Motivation - > Job Performance	0.037	0.043	0.037	1.006	0.015	1.027	0.203		

### Discussions

Four hypotheses were developed and supported by the data in order to meet the study's goals. These findings align with earlier studies by Jyoti et al. (2015), Rafie et al. (2016), Masrek et al. (2017), Thomas and Anggiani (2018), Hartini et al. (2019), Isfahani et al. (2013), and Nafei (2013). All of the data point to a favorable relationship between higher levels of motivation, cognitive capabilities, metacognitive abilities, and behavioral competencies and better work performance among university instructors. By confirming the information gained from earlier research and providing more evidence for the relationship between numerous criteria and job performance in the setting of university teaching, the study adds to the body of knowledge already in existence. This validation emphasizes how crucial it is to address behavioral, cognitive, metacognitive, and motivational factors of CQ in order to improve job performance among university

instructors. As a result, educational institutions can gain important insights on how best to maximize faculty effectiveness and performance.

Professors at universities who are sensitive to cultural differences are excellent communicators with students of different origins and ideologies. Through a thorough comprehension and appreciation of cultural subtleties, beliefs, behaviors, linguistic conventions, and other pertinent characteristics, they can effectively interact with pupils and build rapport and trust. Their ability to link people from different ethnic origins allows them to promote social cohesion and inclusivity in society. Culturally competent teachers perform very well and are flexible in a variety of departments or organizations because they can interact with pupils from a wide range of cultural backgrounds. Their skill in negotiating cultural differences enables them to thrive in a variety of settings, encouraging inclusive learning environments and constructive interactions. Additionally, because of their adaptability, they may make a big difference in diversity and inclusivity campaigns both inside and outside of educational institutions. These educators contribute significantly to the understanding, cooperation, and harmony amongst people from many cultural origins by utilizing their cultural competency, which enhances the social and organizational fabric.

In these kinds of environments, it is critical to comprehend the varied demands of the pupils, and cultural intelligence is essential to this understanding. Teachers with high CQ are able to understand the distinct cultural origins, values, and learning styles of their students, as suggested by Ang and Van Dyne (2008). Their ability to adapt their teaching methods and instructional strategies to the various requirements of their pupils is made possible by this insight, which eventually improves academic performance and student engagement. Furthermore, the development of rapport and trust between educators and students from diverse cultural origins is facilitated by cultural intelligence. Culturally competent teachers help all students feel accepted and at home in the classroom by valuing their cultural identities and establishing an inclusive environment (Rockstuhl et al., 2011). Students are more eager to learn and more likely to participate fully in class activities when there is a positive relationship between them.

Another essential component of teaching in multicultural classrooms is effective communication, and instructors' capacity to interact with pupils from a range of cultural backgrounds is greatly influenced by their cultural intelligence. Culturally competent people, according to Earley and Ang (2003), are able to communicate effectively in a variety of languages and are also aware of the subtle cultural differences and communication patterns. Productive interactions in classrooms and learning outcomes can be promoted by teachers who possess high cognitive quotient (CQ) since they can modify their communication strategies to guarantee comprehension and clarity among all pupils. Teachers that possess cultural intelligence are also more equipped to handle disputes and miscommunications that may result from cultural differences. Culturally savvy educators can stop conflicts from getting worse and preserve a peaceful learning environment by using culturally sensitive conflict resolution techniques and encouraging open communication (Thomas & Inkson, 2009). Students benefit from this by feeling more secure and safe, which supports their educational and social-emotional growth.

Cultural intelligence not only makes teacher-student relationships better, but it also makes it easier for teachers to work with parents, coworkers, and community people from different cultural backgrounds. Culturally intelligent educators can work effectively with stakeholders to improve student learning and well-being by utilizing their cultural understanding and sensitivity (Livermore, 2010). It seems that exhibiting appropriate

## **Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis**

verbal and nonverbal behaviors when interacting with people from different cultures has a higher effect on overall job performance than just taking into account common cross-cultural presumptions, learning general cultural information, and focusing on comprehending and functioning in culturally diverse contexts.

The empirical data emphasizes how important it is for managers in charge of multicultural academic institutions to understand every aspect of cultural intelligence. As such, it is advised that these managers assess the potential employees' extent of cultural intelligence when they are hiring and choosing their candidates. During the interview process, these aspects of cultural intelligence should be carefully evaluated in addition to educational background and work experience. Additionally, educational institutions should give priority to employee orientation throughout the hiring process, then continue to support continuing training and development programs. The adoption of these approaches is expected to result in a notable improvement in work performance at academic institutions, which can be attributed to enhanced cultural intelligence practices. Developing a work environment that values and encourages ongoing education about many cultures can also support diversity and overall effectiveness of academic institutions.

### **Conclusions**

The importance of Cultural Intelligence (CQ) in improving career advancement is highlighted by this study, especially when it comes to job performance (JP). It offers insightful information and contributions in a variety of fields. The frameworks for comprehending Cultural Intelligence (CQ) put out by Ang et al. (2007) and Earley and Ang (2003) are supported, theoretically explaining the relationship between CQ and job performance (JP). Furthermore, it provides empirical support for the association between CQ and JP, particularly in the context of Indian schooling. Moreover, the research goes beyond theoretical frameworks by providing real-world consequences for people who want to improve their employment opportunities by becoming more culturally intelligent. By emphasizing the role that CQ plays in job performance—particularly in the Indian educational context—it offers advice to professionals, educators, and organizations that want to promote cultural competence and enhance performance results. The results also add to the larger conversation on diversity and inclusion in the workplace by highlighting the significance of CQ in fostering cross-cultural competence and understanding.

Additionally, this study provides empirical support for the relationship between job performance (JP) and cultural intelligence (CQ), particularly in the context of India's education system. Apart from validating the theoretical foundations of CQ as previously established by other researchers, this study advances our understanding by emphasizing its application in a particular professional domain. The study confirms the general theoretical framework and expands our understanding of how CQ manifests and influences job performance in many cultural situations by analyzing the real experiences of Indian university instructors. Furthermore, by concentrating on the particular difficulties and chances faced by Indian university instructors, this study offers insightful information to teachers and educational establishments looking to improve student performance through cultural intelligence. The results highlight the value of cultural quotient (CQ) in negotiating heterogeneous cultural contexts and provide guidance on how to successfully include CQ into instructional tactics and learning environments. The study also adds to the larger conversation on cross-cultural management in the field of education by

emphasizing the value of context-specific factors in figuring out how CQ and JP relate to each other.

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The authors contributed equally to this work.

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## **Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis**

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**Article Info**

*Received:* May 06 2025

*Accepted:* May 24 2025

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**How to cite this article:**

Ashraf, A., Andrabi, U., Popescu, V., Birau, R. (2025). Cultural Intelligence and Job Performance: Evaluating Performance of Teachers in Multi-Cultural Educational Contexts using Smart PLS analysis. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 188 – 202.



## ORIGINAL PAPER

# Teachers' perspectives on the digitalization of education

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### Abstract:

Education has faced significant challenges in its digitization process, as the integration of technology in classrooms is often hampered by limited funding and the need for at least basic digital literacy among teachers. The aim of this research is to identify the challenges a teacher faces in a digitized classroom during the teaching-learning process. The question at the center of this study is: How do teachers perceive classroom digital integration, and what obstacles do they face? This study is relevant as it provides valuable insights into the obstacles that teachers face in adapting to digital environments, thus laying the foundation for the development of effective strategies to improve digitized teaching practices. This research used a structured questionnaire consisting of 20 questions. Given the small sample size (19 teachers), the study does not aim to make a statistical generalization. Instead, it focuses on identifying general trends, providing a predominantly descriptive perspective. The research explores the divide between teachers who support the integration of technology in the educational process and those who remain skeptical. The results indicate that most teachers prefer a mixed model, combining traditional methods with technology. Although a majority of teachers identified themselves with an intermediate level of digital competences, they expressed a strong need for additional training and institutional support. Increased student engagement was the benefit most frequently mentioned in the responses, although technical issues (e.g. poor connectivity or faulty devices) were reported as the main barriers. Teachers generally agreed that technology can improve student performance, but only in certain contexts.

**Keywords:** *education, integration of technology, teacher-pupil, challenges, opportunities.*

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## 1. Introduction

The 21st century has brought many technological changes in the field of education (Liu et al., 2021: 57-71). The digitalization of education represents the segment of human activity that focuses on the connection between technology and the achievement of pedagogical objectives (Robert, 2002). Research indicates that the retention rate of information in an online environment range between 25% and 60%, while in a traditional classroom setting, students retain between 8% and 10%.

These results can be attributed to the fact that in the online environment, students benefit from self-paced learning, allowing them to focus on topics of personal interest (World Economic Forum, 2020).

A series of European and international documents support the inclusion of digitalization in the educational field. "The Digital Education Action Plan (2021–2027)" contributes to fulfilling the priorities set by the European Commission, specifically the goal of creating a digital European continent. The "European Green Deal" aims to increase the use of digital technologies and enhance climate neutrality by 2050 (European Commission, 2020). The "2030 Agenda", signed by 193 countries, also emphasizes guaranteeing quality education, among other objectives (Mihăilă, 2020). Thus, technology has become integrated worldwide across all fields, albeit with different development paces for each country. Some countries have advanced rapidly in this regard, while others have progressed more slowly. As a result, disparities emerge between countries, with some possessing more modern educational institutions, while others lag behind technologically (Salehi & Largani, 2020).

The "Organization for Economic Co-operation and Development" program has highlighted that education outcomes can vary significantly from one country to another. One of the promises that technology has made to countries is to enhance the quality of the teaching and learning process for everyone (Vincent-Lancrin, 2022). The evolution of technology has permeated all sectors of society; however, this has not led to equal progress for all countries worldwide (Salehi & Largani, 2020: 9-21). M. Yu and Y. Liao argued that smart teaching is achieved through the use of instructional tools and well-defined objectives. Therefore, smart teaching encompasses the following elements: smart technology, smart teaching practices, and the cultivation of smart talents (Yu & Liao, 2021: 607-612). This statement is consistent with the research conducted by K. Sarnok (Sarnok et al., 2019: 21-26). There are authors who argue that a teaching style may not be effective for some students, or even for the majority, and for this reason, it is recommended that a teacher combine multiple teaching styles, adopting a multifaceted approach (Moazeni & Pourmohammadi, 2019:1-7).

This paper is relevant as it provides valuable insights into the obstacles that teachers face in adapting to digital environments, thus laying the foundations for the development of effective educational and policy strategies to improve digitized teaching practices.

The question the study answers throughout is: How do teachers perceive classroom digital integration, and what obstacles do they face? In order to answer this research question, a 20-question structured questionnaire was administered to a group of 19 secondary school teachers in a single rural school in Romania, equipped with modern technological tools such as interactive whiteboards, smart TVs, laptops, tablets and printers. The questionnaire consisted mainly of closed-ended questions (most of them with a multiple-choice option), some of them offering the option for respondents to add

## Teachers' perspectives on the digitalization of education

additional comments. Given the small sample size of 19 teachers, the study does not seek statistical generalizations. It focuses on identifying general patterns and recurring themes in the responses, providing a predominantly qualitative perspective.

The survey results indicate that the majority of teachers prefer a blended learning model, combining traditional methods with digital tools. Increased student engagement is perceived as the main advantage of using technology in the classroom. However, technical difficulties and lack of adequate training remain significant barriers. While teachers acknowledge that technology can improve student performance, they also stress that the impact of digitization depends on the context of its use. There is also a clear need for additional professional development and access to high-performance digital equipment.

### 2. Material and Method

The present study was conducted using a structured questionnaire composed of 20 questions (Table 1), addressed to teachers from a secondary educational institution located in a rural area of Romania. Over the past two years, the school has been significantly equipped with technological tools, including printers, interactive whiteboards, smart TVs, laptops, and tablets.

The questionnaire consisted primarily of closed-ended (multiple-choice) questions, with some items allowing participants to provide additional responses. Its purpose was to investigate teachers' perceptions of digitalization, their use of digital tools, perceived benefits and challenges, as well as their preferences regarding the integration of technology into teaching practices.

The questionnaire was distributed in physical format, on paper, directly within the school, and was completed by a total of 19 middle school teachers from various subject areas. Data collection took place in January 2025. Participation was voluntary and anonymous. Given the small sample size and the exploratory nature of the study, the results are not intended to be statistically generalizable but instead aim to provide insight into general trends and recurring themes observed among the participants.

### 3. Adservio: A Digital Gradebook Example

The schools also benefit from the services of the Adservio electronic gradebook, which considerably eases the work of teachers, as grades and absences can be recorded easily, the attendance sheet can be signed from any location at the end of the day, and there is a clear record of students' strengths and weaknesses. Parents can view their child's status in real time, and teachers can communicate in real time with parents about any situation involving the student (such as a disciplinary issue or an uncompleted assignment) by sending a message via the mobile application. In the first month of 2025, the school was awarded a Certificate of Excellence by Adservio for choosing to use the electronic gradebook.

### 4. Results

Table 1. Questionnaire

Questionnaire Questions	Teachers' Preferences
1. What subject do you teach?	a) French b) English; c) Romanian Language and Literature; d) Mathematics; e) Art;

	f) ICT; g) Physical Education; h) Chemistry; i) Biology; j) Music; k) History; l) Other subject (please specify):
2. What level of technological competence do you consider you have?	a) Beginner; b) Intermediate; c) Advanced;
3. How often do you use technology in the teaching process?	a) Daily; b) Several times a week; c) Occasionally; d) Very rarely;
4. What online applications do you use most frequently during your classes? (Multiple responses allowed)	a) PowerPoint, Google Slides, Prezi, Canva; b) Storyjumper, Little Bird Tales, Storybird, Mystorybook, Storyboard That; c) Google Docs; d) MindMeister, Coggle, LucidChart, Bubbl.us; e) WordArt, Wordle; f) ClassTools, Kubbu; g) Edpuzzle, Voki, WeVideo, MakeBeliefsComics, Pixton; h) Mentimeter, Kahoot, Google Forms, Socrative, SurveyMonkey; i) Padlet, Symbaloo, Webjets; j) Google Classroom, Microsoft Teams, Zoom; k) Solpfy and Perfect Piano;
5. What types of digital materials do you create or use most frequently? (Multiple responses allowed)	a) Presentations (e.g., PowerPoint); b) Educational videos; c) Online tests; d) Interactive games;
6. What do you consider to be the greatest advantage of using technology in teaching? (Multiple responses allowed)	a) Increased student interest; b) Ability to personalize lessons; c) Access to modern resources; d) Other advantages (please specify):
7. What are the main challenges you encounter in using technology? (Multiple responses allowed)	a) Technical issues (connection, devices, etc.); b) Lack of students' skills in using technology; c) Lack of personal training in using technology; d) Other challenges (please specify):
8. Do you consider that the use of technology improves students' performance?	a) Yes, significantly; b) Yes, but only in certain contexts; c) No, traditional methods are more effective;
9. Do you believe that the integration of digitalization should be expanded to all subjects?	a) Yes, it is important for all subjects; b) No, only for certain subjects (please specify which ones):
10. What kind of support would be helpful for you to use technology more effectively in teaching? (Multiple responses allowed)	a) Additional training courses; b) Access to more advanced devices and software; c) Clear guidelines and resources for digital teaching; d) Other types of support (please specify):

## Teachers' perspectives on the digitalization of education

11. Do you believe that students have equal opportunities to benefit from digital education?	a) Yes, all have the same opportunities; b) No, there are significant differences in access to technology; c) I do not have a clear opinion;
12. How do you think the digitalization of education could be improved? (Multiple responses allowed)	a) By developing more user-friendly platforms; b) By providing high-performance equipment for everyone; c) By implementing more extensive training programs for teachers; d) Other ideas (please specify):
13. Have you noticed any changes in students' engagement since you started using technology?	a) Yes, they are much more engaged; b) Yes, but only in certain specific activities; c) No, I have not noticed any significant changes;
14. What is the main difference you notice between traditional teaching and digital teaching?	a) Increased interactivity; b) Greater workload for teachers; c) Other differences (please specify):
15. If you had to choose, which type of teaching do you consider more effective?	a) Digital teaching; b) Traditional teaching; c) A combination of both;
16. What impact do you think digitalization has on the teacher-student relationship?	a) It improves it, through easier communication; b) It maintains it at the same level; c) It negatively affects it, creating distance;
17. How much time do you dedicate to preparing digital materials for lessons?	a) Less than 1 hour per week; b) 1-3 hours per week; c) More than 3 hours per week;
18. What types of digital activities do you consider most effective in the teaching process? (Multiple responses allowed)	a) Interactive presentations; b) Online tests and automated assessments; c) Collaborative projects on digital platforms; d) Other activities (please specify):
19. Do you believe that the digitalization of education should also include training students for the responsible use of technology?	a) Yes, it is essential; b) Maybe, in certain cases; c) It is not necessary;
20. How do you assess the support provided by the school for the integration of digitalization?	a) Very good (adequate resources and training); b) Good, but with some shortcomings; c) Satisfactory, but insufficient for real needs; d) Poor, almost non-existent;

Source: Author own work

The results of this questionnaire, administered to a group of 19 secondary school teachers, provide important insights into the integration of digital technology in education. With regard to the first question, a balanced distribution among the subjects taught can be noted: 7 teachers belong to the foreign languages (french, romanian, english), 6 teachers to the exact sciences (mathematics, physics, chemistry, biology), 5 teachers to the humanities and arts (history, geography, visual arts, music) and one teacher belongs to the sports field (physical education and sport). This balance shows that the interest in digitization is not limited to certain specializations, but is present across a wide and diversified range of disciplines.

In terms of self-reported technological skills (question 2), 14 teachers state that they have an intermediate level, 4 state that they have an advanced level and only one has a beginner level. These results show a solid foundation in technological competences, but also emphasize the need for continuous professional development.

Regarding the use of technology in teaching (question 3), the majority of teachers (14) claim that they use technology on a daily basis, 4 teachers claim that they use it

several times a week and only one teacher opts for the occasional option, which shows the deep integration of technology in education.

Among the most frequently used applications (question 4) are Google Slides, PowerPoint, and Canva (15 teachers), followed by Google Docs and the educational platforms Microsoft Teams, Google Classroom, Zoom (10 teachers). A preference for visual and interactive tools is identified. The most frequently used digital materials (question 5) include interactive games (14 teachers), educational videos (12 teachers) and presentations (11 teachers), emphasizing the importance of dynamic methods to capture students' attention. The main advantage of the use of technology in education (question 6) is the increased interest of students (15 teachers), access to modern resources (7 teachers), and personalization of lessons (5 teachers). On the other hand, the main challenges identified (question 7) are technical (13 teachers), insufficient teacher training (5 teachers), and lack of digital skills among students (3 teachers).

As for the impact of technology on pupils' school performance (question 8), 13 teachers consider that it helps to improve performance only in certain contexts, 4 consider that it is significantly improved, and only one prefers traditional methods. A majority of teachers (18 teachers) support the idea of extending digitization to all school subjects (question 9). The support needed for more effective integration (question 10) includes additional courses (11 teachers), well developed guides (8 teachers) and the most advanced devices (7 teachers).

Teachers believe that there are significant inequalities in students' access to digital education (question 11), with the majority (15 teachers) pointing to the need for educational equity policies. In order to improve digitization (question 12), the main solutions identified include high quality equipment (12 teachers), intuitive platforms (7 teachers) and training programs (4 teachers). Regarding student engagement during class time (question 13), 8 teachers report a significant increase and 6 teachers report a limited increase in specific activities.

Digitalization has a positive influence on the teacher-pupil relationship (question 16), making communication easier for 14 teachers, while 4 consider it neutral and one negativ. Most teachers (14) devote between 1-3 hours per week to preparing digital materials, and 5 teachers devote more than 3 hours per week (question 17), reflecting a serious commitment to integrating technology in education. The most effective digital activities for a student (question 18) are interactive presentations (17 teachers), online quizzes (6 teachers), and collaborative projects (2 teachers). Teachers consider it very important to train students to use technology responsibly (16 teachers), and 3 of them say that this is only in certain cases (question 19).

The institutional support provided to the school for the integration of digitization (question 20) is rated as very good (13 teachers), and another 6 teachers see it as good, but with some shortcomings, suggesting the need for further improvements in this area.

#### **4.1. Analysis of digitalization in education by curricular area - The Use of Technology and Teachers'**

##### **4.1.1. Language and Communication (French, Romanian, English)**

Following the evaluation of the questionnaires distributed to teachers, those belonging to the Language and Communication curricular area (Romanian language and literature, French - first language, and English - second language), totaling seven teachers, chose the following options: intermediate level (5 teachers), beginner level (1 teacher), and advanced level (1 teacher).

## Teachers' perspectives on the digitalization of education

Regarding the daily use of technology in the teaching process, five teachers selected the option indicating that they use technology in education on a daily basis, while two other teachers chose the option of using it several times a week. In terms of the use of applications in education, the most frequently chosen options, in ascending order, were: PowerPoint, Google Slides, Prezi, Canva, and Google Docs. One teacher opted for Edpuzzle, WeVideo, MakeBeliefsComics, Pixton, Mentimeter, Kahoot, Google Forms, Socrative, SurveyMonkey, as well as Padlet, Symbaloo, and Webjets. With regard to other types of digital materials used in class, interactive games and educational videos ranked first and second, respectively.

A classification of applications that students can use during lessons can be identified in the manner of Bloom's taxonomy, which includes levels such as creation, evaluation, analysis, application, understanding, and knowledge, according to Table 2.

Table 2. Correlation of Bloom's Taxonomy with Digital Tools

Levels of Bloom's Taxonomy	Some Digital Tools
Creation	Wevideo, Genially, 30hands, Bookcreator, Glogster, StoryboardThat
Evaluation	Socrative, Formative, Google forms, Wizerme, PollEverywhere, Testmoz, Propofs, Kaizena, Liveworksheets
Analysis	Edmodo, Doctopus, Online Rubric, Citelighter, Hemingway
Application	Google Slides, Google MyMaps, Animoto, Bubbleus, Lucidchart
Understanding	Thinklink, Edublogs, Pixton
Knowledge	Padlet, Ideaboard, Diigo, Google Keep, SeeSaw.

Source: Curo, 2022

The teachers consider that the greatest advantage of teaching using technology is the increased interest of students, as well as access to modern resources, with one vote also noting the ability to personalize lessons. The main challenges faced by teachers when using technology are technical issues; however, there were also two votes for the option indicating a lack of personal training in using technology. The majority of the teachers surveyed agreed that the use of technology improves students' performance, but only in certain contexts.

Teachers in this curricular area frequently use digital presentations, such as PowerPoint, Google Slides, Prezi, and Canva (15 teachers), as well as Google Docs (10 teachers). This indicates a preference for applications that facilitate organization and collaborative writing. Regarding quiz-based applications, their usage appears to be slightly less prevalent but not entirely absent. Tools such as Mentimeter, Kahoot, and Google Forms are employed by seven teachers, suggesting that these applications are utilized to enhance classroom interaction.

Video materials are somewhat more widely used (12 teachers), reflecting an effort to adopt a multisensory approach to learning. Regarding the impact on student performance and preferred teaching methods, it is observed that the majority of teachers (13 teachers) believe that technology enhances student performance only in certain situations. While it is beneficial for increasing motivation, it cannot replace traditional teaching methods. All teachers unanimously prefer a blended approach to teaching, indicating that technology is valuable when integrated with traditional teaching and learning methods.

#### **4.1.2. Mathematics and Natural Sciences (Mathematics, Physics, Chemistry, Biology)**

These teachers frequently use interactive games (14 teachers), indicating that gamification is a popular approach in the field of exact sciences. Presentations (11 teachers) and video materials (12 teachers) are also considered powerful tools for enhancing the comprehension of complex concepts. However, a relatively low number of teachers opt for online tests (4 teachers), suggesting that challenges still exist in adapting to digital assessments. This highlights a strong preference for traditional testing methods. Regarding the benefits and challenges of digitalization in education within this curricular area, access to modern resources (7 teachers) is seen as a major advantage, particularly when conducting simulations and virtual experiments. However, technical issues, such as weak internet connectivity and inadequate equipment, often limit access to educational software. Concerning the impact on student performance and preferred teaching methods, the majority of teachers (13 teachers) consider technology useful in certain situations, emphasizing that visualization aids students in understanding concepts more effectively. However, traditional methods remain essential for problem-solving exercises. All teachers prefer a blended teaching and learning approach, integrating both digital and traditional methods.

#### **4.1.3. Human and Society (History, Geography, Social Education)**

These teachers use tools for document writing and sharing, such as Google Docs and Padlet (2 teachers). Additionally, interactive maps and applications like MindMeister, Coggle, and LucidChart are employed. For interactive assessment and review, quiz-based applications (Kahoot, Socrative – 7 teachers) are commonly utilized. Regarding the benefits and challenges of digitalization in education from the perspective of this curricular area, access to modern resources (7 teachers) and increased student engagement (15 teachers) are the primary benefits identified by teachers. However, institutional support is needed for the integration of digitalization into education. The main challenges faced by teachers in this field include technical issues (13 teachers) and a lack of training courses (5 teachers). Concerning the impact on student performance and preferred teaching methods, teachers generally consider technology useful in certain situations (13 teachers). This suggests that, in subjects such as history or social education, which rely heavily on critical analysis, traditional methods cannot be entirely replaced by technology. The preference for a blended teaching approach—combining modern and traditional methods—is also evident in this curricular area, as technology cannot fully replace debates or individual reading.

#### **4.1.4. Arts (Visual Arts, Music)**

In the field of music education, the music teacher utilizes specialized software during lessons, such as Solphy and Perfect Piano. Interactive presentations are the most frequently used tools, highlighting a need for visualizing the creative process to enhance creativity.

Regarding the benefits and challenges of digitalization in education from the perspective of this curricular area, it can be inferred that technology provides valuable support and new creative opportunities. However, continuous additional training is necessary for successful integration into the artistic domain. On the other hand, a significant challenge is the lack of adequate equipment (7 teachers), which visibly impacts

## **Teachers' perspectives on the digitalization of education**

the use of digital tools in artistic subjects such as visual arts and music. Concerning the impact on student performance and preferred teaching methods, all teachers in this curricular area, like their colleagues in other disciplines, prefer a blended teaching approach, as practical and sensory experiences are essential for fostering students' creative development.

### **Discussion**

The research results show a noticeable inclination among teachers regarding the use of technology in education. It is evident that the majority of teachers prefer an educational mix, using both traditional education methods and modern education (technology integration). Out of 19 respondents, 15 indicated that they possess intermediate-level knowledge, which suggests that teachers still require training in using technology in the classroom. A total of 15 responses highlighted that the greatest advantage of using technology in teaching is the increased student interest. However, there are also several challenges faced by teachers when using digital tools in lessons, with technical issues (connection, devices) ranking first among the responses. The majority of teachers believe that students' performance is improved by technology, but only in certain contexts, meaning not universally.

Most of the of the selected options by teachers indicate a preference for additional training courses as support for using technology effectively in teaching, and the provision of high-performance equipment for all as a means of improving the digitalization of education.

Students are more engaged at school since the introduction of technology, but only in specific activities. There is a noticeable increase in student interactivity since the use of technology in classroom lessons. Among teachers, the most commonly used online applications are: at the top are PowerPoint, Google Slides, Prezi, and Canva, followed by Google Docs, Google Classroom, Microsoft Teams, and Zoom, with Mentimeter, Kahoot, Google Forms, Socrative, and SurveyMonkey ranking third.

### **Conclusions**

The survey was carried out by 19 teachers in a rural secondary school, showing an openness towards the integration of technology in the educational process. Most respondents prefer a blended teaching model, combining traditional methods with digital tools. Technology is perceived as a factor that increases students' interest and involvement, but its effectiveness varies according to the context of application. The most common obstacles are technical difficulties and lack of training. Teachers are asking for practical support in the form of training courses and the provision of high-performance equipment. Teachers also stress the importance of training pupils to use technology responsibly.

The unanimous preference for blended learning reflects a balanced and realistic approach to the digitization process, emphasizing both innovation and the value of traditional methods. The results indicate the need for educational policies that support digital equity and the development of digital competences in schools.

### Authors' Contributions:

The authors contributed equally to this work.

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### Article Info

*Received:* March 26 2025

*Accepted:* May 14 2025

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## Teachers' perspectives on the digitalization of education

**How to cite this article:**

Grosu, D. M., Stoica, V. (2025). Teachers' perspectives on the digitalization of education. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 203 – 213.



## ORIGINAL PAPER

# Problematics of Translation of Some Terms Related to “Treuhand”

Irina Gvelesiani<sup>1)</sup>

### Abstract:

The ongoing globalizing processes and growing influence of the Anglo-American legal institutions have significant impact on the juridical and linguistic landscapes of the majority of the European countries. The tendency of rendering some concepts or institutions unique to the common law context sometimes results in difficulties related to their transmission, implementation and translation. The present paper deals with the German and Swiss *Treuhand*-s (the “counterparts” of the common law *trust*) and the major concepts related to these institutions. The main accent is put on the problems associated with the translation of the terms related to the German and Swiss *trust-like devices* / *Treuhand*-s. The appropriate renaming oriented towards the determination of belongingness is presented as the best way of the solution of the problem of translation. The methodology of research relies on the onomasiological approach proposed by Vienna School of Terminology, Cabré’s assumption regarding the three-fold nature of terms and Kyo Kageura’s attitude towards the terminological space. The novelty of the research is the presentation of new lexical units (*Deutsche Treuhand*, *Deutscher Treugeber*, *Deutscher Treuhänder*, *Schweizerische Treuhand*, *Schweizerischer Treugeber*, etc.) and their English counterparts (*German trust* *German trustor* / *settlor*, *German trustee*, *Swiss trust* *Swiss trustor* / *settlor*, *Swiss trustee*, etc.).

**Keywords:** *law, onomasiological approach, translation, Treuhand, trust, trust-like device*

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## Problematics of Translation of Some Terms Related to “Treuhand”

### The General Introduction

“Terminology begins with the concept and aims to clearly delineate each concept” (Temmerman, 2000 : 4). These words of Eugen Wüster correspond to the basic principles of Vienna School of Terminology founded by him in the 20<sup>th</sup> century. It is noteworthy that Wüster’s doctoral dissertation was considered as a pillar of the terminological studies that established the principles of systematizing work with terms. Those principles were oriented towards concepts and their standardization leading to the *General Terminology Theory (GTT)*. This theory was focused on “specialized knowledge concepts for the description and organization of terminological information. Within this framework concepts were viewed as being separate from their linguistic designation (terms)” (Benítez, 2009 : 111). The major purpose of the *General Terminology Theory (GTT)* i.e. the traditional terminology “was to assign a new term to a new concept that appeared in a language. In the naming process, terminologists started from the concept, which they placed into a concept system, on the basis of which it had been defined before being named as a term (the onomasiological approach). Their main focus was on exploring the ways in which to make terminology as efficient and unambiguous as possible. They were adherents of monosymy (the precision of concepts) and univocity of term (absence of synonymy). Their objective was to achieve a standardization of terminology – a tool for reaching unambiguous and clear communication, independent of cultural differences” (Sageder, 2010: 125).

Supposedly, the main drawback of the *General Terminology Theory* was the proposition of the monosemic reference between concepts and terms. Accordingly, a term or a specialized language unit was characterized by its single-meaning relation with a concept designated by it. Polysemy and synonymy were excluded. This approach of the *General Terminology Theory* raised criticism of the proponents of the socioterminology proposed by Gaudin in the early 1990s. Pihkala argued that concept systems and definitions were not static in the specialized language and the polysemy as well as the synonymy were “inevitably presented in terminology and specialized texts, and the use of one term instead of another could reflect the knowledge, social and professional status of a group of users, as well as the power relationships between speakers” (Benítez, 2009 : 111).

It is noteworthy that the *General Terminology Theory* was discussed by Professor Cabré – an initiator of the *Integrated Theory of Terminology*. She described terms as well as terminological units as many-sided. Cabré used the image of the polyhedron to show the multidimensional nature of terms. She stated: “At the core of the knowledge field of terminology we, therefore, find the terminological unit seen as a polyhedron with three viewpoints: the cognitive (the concept), the linguistic (the term) and the communicative (the situation). These linguistic, cognitive and communicative units should be studied in a given discursive context, because they only acquire a meaning and function in discourse” (Moreira, 2019). Moreover, a “specialised discourse presents an organised structure of knowledge. This structure could be represented as a conceptual map formed by nodes of knowledge, which can be represented by different types of units of expression, and by relations between these nodes” (Castellvi, 2003 : 189). Besides describing the three-fold nature of terminological units, Cabré argued that terminology is a true scientific discipline. Her opinion was shared by Kageura, whose approach towards the study of terminology can be summarized in the following way:

“1. The concepts vocabulary and domain are required before the concept of terminology is consolidated. These concepts are extra-linguistic, so the existence of the concept terminology is supported by certain extra-linguistic factors.

2. The concept terminology is consolidated at the level of ‘parole’, and the proper theory of Terminology can obtain an independent status de jure, only providing that it is linked up with the concept ‘domain’ or some of its representations.

3. The concept of terminology precedes the concept of term: ‘It is terminology, not individual terms, that corresponds more closely to the concept domain’... This means that if a lexical unit is to be recognized as a term, a terminological space for its placement should exist in advance. Thus, when treating terms as empirical objects (a *quid facti* point of view), we always presuppose the existence of the concept of terminology which belongs to the sphere of parole” (Sageder, 2010 : 132).

The above mentioned enables us to suppose that the concept-based designation can become an integral part of the process of translation. It may simultaneously rely on a comparative analysis of concepts in order to fully preserve and transpose into a target language the content of a legal information presented in a source term. Moreover, we believe that a successful translation or naming requires linguistic and legal comparative approaches as well as the awareness of legal settings in which the terms to be translated must be used - legal comparatists and legal translators / interpreters need to penetrate a linguistic surface of a legal system in order to grasp peculiarities in legal thinking and to understand legal constructs behind terms and phrasemes used in a foreign legal language (Ruusila & Lindroos, 2016 : 121).

In accordance to the above mentioned, our research relies on the onomasiological approach proposed by Vienna School of Terminology. At the same time, it considers Cabré’s assumption regarding the three-fold nature of terminological units and Kageura’s attitude towards a terminological space. As a result, we create a complex method of the study of the lexical units related to the contemporary German and Swiss *trust-like devices* / *Treuhand*- s.

Before starting the discussion of the *trust-like devices*, it is necessary to deal with the common law *trust* and its legal as well as linguistic peculiarities.

### **The Common Law Trust**

The *trust* as a legal institution originated in common law of the Middle Ages. It can be defined as “an equitable obligation, binding a person (who is called a “trustee”) to deal with property over which he has control (which is called the trust property), for the benefit of persons (who are called the beneficiaries or *cestuis que trust*) of whom he may himself be one” (Thévenoz, 2009 : 6).

The contemporary *trust* is based on the duality of ownership: property resulting from a legal estate is divided into property of a trustee and an equitable interest – property of a beneficiary. More precisely, the *trust* can be characterized in the following way:

- the institution of the *trust* is deeply rooted in the English legal tradition and creates the relationship subject to the rules of equity. It divides a *trustor*’s ownership into property of a *trustee* and property of a *beneficiary* (an equitable interest);
- a trust contract is usually created *inter vivos* or on death (the so-called *testamentary trust*), orally or in a written form;
- the creation of the *trust* may serve charitable, protective, promotional and other purposes;

## Problematics of Translation of Some Terms Related to “Treuhand”

- the ordinary Anglo-American *trust* consists of three major elements / participants of entrusting relationships: a *trustor* - a person who creates the *trust*; a *trustee* - a person or a legal entity that holds a legal title to *trust property*; a *beneficiary* – a beneficial (or an equitable) owner of property. It is noteworthy that a *trustor* can also be a *beneficiary*. In this case, the *trust* involves a simple delegation of responsibilities.

### Germany’s Treuhand

It is admitted that “nowhere in German law can one find any single institution which by itself performs all those functions for which common lawyer deploys the trust” (Kotz, 1999 : 85). Moreover, as Hungarian scholar Sandor believes, the German case law does not recognize the institution of the *trust*, because it is incompatible with the dogmatic foundations of the German law. The *trust* does not even resemble the legal relationship of the *Treuhand* (Sándor, 2014 : 250) that has some features of entrusting and contractual relations. Würdinger mentions that “there is no typical trust contract; the content of the legal relation must be determined in accordance with the surrounding circumstances, and in particular the mandate upon which it is based. The Reichsgericht has already declared it fruitless to classify a contract as a trust contract and to try to decide a case upon that footing” (Würdinger, 1951 : 105).

Despite all the above-mentioned, the study of the contemporary German legal system reveals the existence of several *trust-like devices* that work differently, but perform functions similar to the *trust*. Häcker directly indicates that “in some situations a person holds rights for the benefit of another, via a device described by the umbrella term *Treuhand*... A *Treuhand* arises only in a limited number of particular instances (scattered throughout the BGB and developed outside the statutory framework), each subject to its own specific rules and principles” (Häcker, 2009 : 39-40).

The *Treuhand* is usually flexible and exempt from a state control. It considers the transference of ownership based on *Vertrauen* (trust) and *Treue* (loyalty).

The *Treuhand* “is created by a transfer of assets to the *Treuhänder* coupled with a contractual agreement made between him and the transferor under which he assumes, normally in consideration of a fee, a contractual duty to manage the assets in a particular way for the benefit of the beneficiaries” (Kotz 1999, 89). In other words, the (*fiduziarische*) *Treuhand* is a fiduciary construction by which an individual transfers the full right *in rem* to another individual. Accordingly, the German entrusting relations consider the following major participants:

- *Treugeber* - an individual, which transfers the full right *in rem* to another individual, who is obliged to deal with assets in the manner specified by a contract;
- *Treuhänder* – an individual, who is obliged to deal with transferred assets in the manner specified by a contract.

The *Treuhand* may exist without any written underpinning documents. It can be concluded between any two persons. Although in most cases the *Treuhand* represents a two-party relationship, it can include the third party relationships too.

It is also noteworthy that the *Treugeber* transfers his (her) juridical ownership to the *Treuhänder*, but retains an economic ownership. Therefore, a transferee (*Treuhänder*) becomes a legal owner, whose duties are called fiduciary duties: “The *Treuhänder* acquires a full and unrestricted title to the *Treuhand* assets, whereas the

beneficiaries' interests are, at least in theory, merely the ordinary rights *in personam* of parties to a contract" (Kotz, 1999 : 93). Assets, which are kept by the **Treuhänder** under a fiduciary agreement, are separated from his / her private patrimony and form a separate fund, but only to a certain extent. All assets that are acquired in exchange for the original **Treuhand** property do not fall into a separate fund and are thus not protected against private creditors of the **Treuhänder**. Accordingly, there is no "real subrogation" (Zachariasiewicz, 2003 : 46).

It is worth noting that the **Treuhänder** can transfer a legal title to the third person, while the **Treugeber** has only damages claims in those cases, when a transferor violates obligations. It means that the **fiduziarische Treuhand** does not fully protect rights of the **Treugeber**. Accordingly, a practical implementation of this construction seems quite risky.

### Switzerland's Treuhand

The essence of the 20<sup>th</sup> century Swiss entrusting relations can be well-defined via the following citation: "The character of the fiduciary act lies in this that one of the contracting parties (the settler) creates a legal position for the other (trustee) which makes him unlimited owner of a right towards third persons, while he is obliged, under the contract with the settler, to exercise the transmitted right not at all, or only partially, or to retransmit it under certain supposition..." (Huber, 1952 : 65).

It is worth mentioning that initially the Swiss entrusting / fiduciary relations (the so-called **Treuhand / fiducie**) were considered as the modernization of the ancient Roman **fiducia** that comprised two distinct acts:

- a disposal, using a formalistic procedure of *mancipatio*, whereby a creator transferred to a fiduciary an ownership of a fiduciary property;
- a distinct agreement, the so-called *pactum fiduciae*, whereby a fiduciary undertook to restore a fiduciary property to a creator under certain conditions (Thévenoz & Dunand, 1999 : 326).

It is difficult to identify the date of the origin of the Swiss **fiducie**. However, it can be supposed that its development started in 2007, when Switzerland ratified the *Hague Convention on the Law Applicable to Trusts and on their Recognition* of 1 July 1985. The ratification of the convention facilitated the introduction of the certain significant provisions in the SPILA and SDCBA (*Swiss Private International Law Act* and *Swiss Debt Collection and Bankruptcy Act*). As a result, according to the Swiss legislation, a fiduciary relationship has usually been established under the umbrella of the "unity of patrimony". It is noteworthy that "Swiss case law has explicitly rejected the notion of a division of ownership between an external title for the trustee and an internal title for the settler or third-party beneficiaries. The property belongs indivisibly to the trustee... the principle of "unity of patrimony" prevents the formation of a separated fund within the estate of the trustee" (Peirot, 2013 : 42).

Despite the above mentioned, the scholars express different ideas regarding the existence of *Trust Law* in Switzerland. Overbeck believes that there is no institution called "trust" in Swiss law and there is no institution which can meet the conditions of the Principles (Overbeck, 1999 : 105). Wilson and Nagai express almost the same idea: the "Anglo-American trust has not (yet) found its way into the Swiss legislation: there is currently no Swiss substantial law on trust" (Wilson & Nagai, 2012: 26).

Many researchers believe that the Swiss **Treuhand / fiducie** is the nearest cousin of the **trust** (Thévenoz, 2014 : 33), while Hungarian scholar Sandor supposes that in the

## Problematics of Translation of Some Terms Related to “Treuhand”

laws of Switzerland, the *Treuhand / Fiduzia* is a unique equivalent of the *trust* (Sandor, 2015 : 302). Moreover, this scholar presents a more precise description of the Swiss fiduciary relationships:

“In case of the Treuhand, the settler (*Fiduziant, Treugeber*) transfers the property (*Treugut*) to the trustee (*Fiduziar, Treuhänder*). The Fiduziar acquires legal title to the property and undertakes a contractual obligation to use the property for the benefit of the settler or third parties, as instructed by the settler” (Sandor, 2015 : 302).

According to this definition, the major participants of the Swiss entrusting relationships are:

*Fiduziant / Treugeber* - a transferor;

*Fiduziar / Treuhänder* - a transferee;

*Begünstigter* – a beneficiary, who is presented by a settler or the third parties.

In certain cases, the German terminological units related to the entrusting relationships can be substituted by their French equivalents that are presented in Rapp’s following definition:

“Contrat par lequel une personne, le fiduciant, transfère un droit à une autre, le fiduciaire, qui s’oblige à en user selon les indications du fiduciant, en général à le retransférer dans certaines conditions” (Overbeck, 1999 : 105).

Accordingly, the *Fiduziant / Treugeber* can be substituted by the French term *fiduciant*, the *Fiduziar / Treuhänder* - by the *fiduciaire* and the *Treuhand* - by *fiducie* (*acte fiduciaire*) or *Fiduzia*.

### The Terminological Insights

The study of the contemporary German and Swiss *trust-like devices* and their English counterparts leads to some terminological insights. In addition, the data presented in different dictionaries acquire the greatest importance, for instance, “Routledge German Dictionary of Business, Commerce, and Finance” indicates to the following English equivalents of the German lexical units related to the *Treuhand*:

*“Treuhand* – Trust;

*Treuhänder* – Trustee, fiduciary;

*Treugeber* – Settlor, transferor, trustor (AmE)” (Routledge German Dictionary of Business, Commerce, and Finance: German-English/English-German, 1997 : 359).

The same data is presented in Haschka and Schmatzer’s well-known book “Aspects of U.S. business and law (An English-language survey with German-language comments)”. The book directly states that “the essential elements of a trust are:

- A trustor or settler (*Treugeber*).
- A beneficiary (*Begünstigter*).
- A trustee (*Treuhänder*).

A fund or corpus (*zweckgebundene Vermögensmasse*) the title to which passes to the trustee)” (Haschka & Schmatzer, 1990 : 167)

“Collins English-German Dictionary” presents the following German counterparts of the common law *trust*:

- “(*law, finance*) Treuhandschaft) *f*
- (= *property*) Treuhandigentum *nt*
- (= *charitable fund*) Stiftung *f*” (Collins English-German Dictionary).

“Langenscheidt Almann Fachwörterbuch Kompakt Recht English” indicates to the following equivalency of German and English terms:

*“Treugeber* – m. settlor; donor; grantor of a trust.

**Treuhand** f – trust.

**Treuhänder** – m. trustee; trusted person; fiduciary” (Langenscheidt Alpmann Fachwörterbuch Kompakt Recht English, 2009 : 637).

The existence of the above mentioned equivalents makes obscure the essence of the **Treuhand** and equalizes it with the Anglo-American **trust**. Some scholars thoroughly discuss this question, for instance, Stark directly indicates that the term **Treuhand** has purely German origin: “the German word “*treu*” means true and implies faithful” (Stark, 2009 : 3). Despite this fact “the word *Treuhand* is not a clear term in German, it cannot be exclusively described as a trust in English either. For this reason, it is best to continue using the German word *Treuhand* because it has no equivalent in English” (Stark, 2009 : 3).

Rehahn and Grimm share Stark’s idea and state: “German law is neither able to produce exactly the same effects as a trust in common law nor has it one specific concept that works as a trust... the German law does not know a homogeneous concept of a trust...” (Rehahn & Grimm, 2012 : 94). According to Rehahn and Grimm, the term **Treuhand** must be translated as the **German trust**. The scholars believe that the usage of this word-combination will help with “eradication” of ambiguities during the process of translation. The same English equivalent (*German trust*) of the **Treuhand** is presented in the following passage of the book “Property law and economics”: “Concerning the unitary ownership characteristic, society has created different kinds of ownership, which can be seen as forms of divided ownership, as the *Treuhand* (*German trust*) and *fiducie-gestion* (*French trust*)” (Hoofs, 2010 : 28).

Obviously, the **German trust** is the best English counterpart of the term **Treuhand**. It may also be useful to translate the **Treugeber** as the **German trustor / settlor**, the **Treuhänder** as the **German trustee**, the **Begünstigter** as the **German beneficiary** and the **Treuhandeigentum** as the **German trust property**. In this case, the results of renaming can be presented in the following way:

**Table 1.** The contemporary German terms of the German law and the proposed English equivalents.

Definition	The German terms	The proposed English equivalents
A legal institution	Treuhand	German trust
A transferor of the property	Treugeber	German trustor / settlor
A transferee	Treuhänder	German trustee
A person, who benefits from the exploitation	Begünstigter <sup>18</sup>	German beneficiary
An object of entrusting relationships	Treuhandeigentum	German trust property

The same method may be used in case of the Swiss linguistic landscape. The **Swiss trust** seems the best English counterpart of the term **Treuhand**. Moreover, the lexical units

<sup>18</sup> It is noteworthy that in accordance to content of a contract, the **Begünstigter** may be presented by the **Treugeber** or the **Treuhänder**.

## Problematics of Translation of Some Terms Related to “Treuhand”

*Swiss trustor / settlor, Swiss trustee, Swiss beneficiary and Swiss trust property* can be created.

However, the study of Germany’s and Switzerland’s linguistic-juridical realities revealed the conceptual differences of the *trust-like devices* of these countries. German and Swiss *Treuhand*-s have different essences. We believe that the appropriate renaming can prevent from ambiguity and misunderstanding. Accordingly, it is preferable to name the *German trust-like device* as the *Deutsche Treuhand*. Moreover, the corresponding changes can be presented in the following way:

**Table 2.** The existed and proposed German terms.

Definition	The existed German terms (German law)	The proposed German terms (German law)
A legal institution	Treuhand	Deutsche Treuhand
A transferor of the property	Treugeber	Deutscher Treugeber
A transferee	Treuhänder	Deutscher Treuhänder
A person, who benefits from the exploitation of the trust property	Begünstigter	Deutscher Begünstigter
An object of entrusting relationships	Treuhandeigentum	Deutsches Treuhandeigentum

The following table presents the final results of the renaming:

**Table 3.** The Proposed German terms and their English equivalents.

Definition	The proposed German terms (German law)	The proposed English equivalents
A legal institution	Deutsche Treuhand	German Trust
A transferor of the property	Deutscher Treugeber	German trustor / settlor
A transferee	Deutscher Treuhänder	German Trustee
A person, who benefits from the exploitation of the trust property	Deutscher Begünstigter	German Beneficiary
An object of entrusting relationships	Deutsches Treuhandeigentum	German trust property

It is worth mentioning that the study of the German and Swiss entrusting relationships reveals the following correlation of the terms denoting the elements of the German *Treuhand* and the Swiss *trust-like mechanism*.

**Table 4.** The contemporary German terms of the German and Swiss laws.

Definition	German law	Swiss law (German Version)
A legal institution	Treuhand	Treuhand
A transferor of the property	Treugeber	Treugeber
A transferee	Treuhänder	Treuhänder
A person, who benefits from the exploitation of the trust property	Begünstigter	Begünstigter <sup>19</sup>

The table reveals that the terms presented in the German law coincide with the lexical units related to the Swiss *trust-like mechanism*. This correlation seems impossible, because according to the above mentioned, Germany's and Switzerland's *Treuhand*-s have different essences. The Swiss entrusting relations are oriented to the principle of the "unity of patrimony", which prevents the formation of a separated fund within an estate of a trustee. This principle is unacceptable to the German *Treuhand*, which is oriented to the creation of a separate fund. Accordingly, for avoiding the terminological ambiguity, we propose the following correlation of the German terms related to Germany's and Switzerland's *Treuhand* -s:

**Table 5.** The correlation of the proposed German terms of the German and Swiss laws.

Definition	German law	Swiss law (German Version)
A legal institution	Deutsche Treuhand	Schweizerische Treuhand
A transferor of the property	Deutscher Treugeber	Schweizerischer Treugeber
A transferee	Deutscher Treuhänder	Schweizerischer Treuhänder
A person, who benefits from the exploitation of the trust property	Deutscher Begünstigter	Schweizerischer Begünstigter
	Deutsches Treuhandeigentum	Schweizerisches Treuhandeigentum

<sup>19</sup> It is noteworthy that in accordance to content of a contract, the *Begünstigter* may be presented by the *Treugeber*.

### Conclusions

Despite the existence of the significant differences between the common and civil legal traditions, there is the evident tendency of the convergence between these juridical regimes. This tendency is caused by the ongoing globalizing processes, global competitive atmosphere, growing influence of the Anglo-American legal institutions, increased role of a foreign investment, etc. One of the clear examples of the convergence is the existence of the “counterparts” of the common law *trust* in Germany’s and Switzerland’s juridical systems.

The paper presents the in-depth analysis of the peculiarities of the German and Swiss *trust-like devices* and discusses some ambiguities, which exist in the sphere of legal terminology. The certain propositions are made regarding the translation of some terminological units and renaming of several concepts related to the German and Swiss *Treuhand*-s. We believe that the given renaming will “ease” the process of translation and will improve the existed conceptual incompatibility as well as ambiguity.

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## Article Info

*Received:* January 08 2025

*Accepted:* May 10 2025

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### How to cite this article:

Gvelesiani, I. (2025). Problematics of Translation of Some Terms Related to “Treuhand”. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 214 – 224.



## ORIGINAL PAPER

# Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

Andrei Cristian Spulbar<sup>1)</sup>, Otilia Maria Trasca<sup>2)</sup>

### Abstract:

FinTech, an innovative blend of financial technology, is emerging as a pivotal solution to tackle pressing climate challenges. This study explores the dynamic intersection of FinTech and climate action, highlighting its transformative role in financing renewable energy, enabling blockchain-based carbon trading, and advancing sustainable investments. Driven by increasing public awareness and interdisciplinary collaboration, FinTech facilitates the transition to a green economy through tools like ESG data analytics, crowdfunding, and digital insurance tailored for vulnerable populations. The bibliometric analysis conducted between 2016-2024 underscores a significant rise in academic interest, with an annual publication growth of 61.6%, emphasizing global engagement from key regions such as China, the EU, and South Asia. Central themes include the reduction of CO2 emissions, economic growth, and renewable energy investments, reflecting a holistic approach to sustainability. This study positions FinTech as not merely a technological innovation but a critical enabler in achieving global climate goals and sustainable economic development.

**JEL:** G20, Q01, Q54, G23, Q58

**Keywords:** *FinTech, Climate Change, Sustainable Development, Carbon Emissions, Green Finance*

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### Introduction

Financial technologies, commonly referred to as FinTech, have undergone rapid evolution in recent decades, fundamentally transforming the way financial resources are managed and distributed globally. Simultaneously, climate issues have become one of humanity's most pressing challenges, demanding innovative solutions and interdisciplinary collaborations to address climate change, reduce carbon emissions, and transition to a sustainable economic model. In this context, FinTech is playing an increasingly significant role, offering digital tools for green financing, emissions trading, sustainable investments, and reducing the ecological impact of the traditional financial system.

The growing interest of researchers in the connection between FinTech and climate issues reflects an intensifying global concern about the impact of climate change and the need for a transition to sustainable practices. In recent years, public awareness of the climate crisis has risen significantly, driven by extreme events such as global temperature increases, biodiversity loss, and the heightened frequency of natural disasters. This heightened sensitivity has spurred not only political and economic actions at an international level but also increased academic interest in innovative solutions that can help combat these issues.

In this context, FinTech has emerged as a promising solution, offering digital technologies capable of facilitating the transition to a green economy. Crowdfunding for renewable energy projects, blockchain-based carbon transactions, or digital tools for assessing climate risks are just a few examples of how these technologies can meet the needs of a population increasingly concerned with the impact of climate change. This social pressure, combined with rapid technological advancements, has created a fertile environment for interdisciplinary research exploring FinTech's potential to become a catalyst for sustainable climate solutions.

Given the complexity and scale of climate challenges, FinTech has evolved beyond being merely a branch of financial technology—it has become an essential tool for supporting the transition to sustainability. The application of FinTech in this context spans a wide range of initiatives, from sustainable financing to climate risk analysis. For instance, blockchain-based digital platforms have been utilized to facilitate transparency and efficiency in carbon transactions, providing a secure framework for trading carbon credits and other market instruments essential for reducing global emissions (Addy et al., 2024).

At the same time, FinTech plays a crucial role in financing green projects through crowdfunding and other innovative methods, enabling communities to directly participate in funding renewable energy initiatives or eco-friendly infrastructure projects. These initiatives are supported by advanced technologies that analyze ESG (Environmental, Social, and Governance) data, contributing to better-informed investment decisions and increased trust in sustainable finance (Ashta, 2023), (Elias et al., 2024).

Moreover, FinTech provides solutions for financial inclusion, addressing vulnerable populations most affected by climate change. Through accessible and tailored financial products, such as microfinancing or digital insurance, these technologies can enhance resilience to natural disasters and other effects of climate change (Mhlanga, 2022).

As smart cities become a global priority, FinTech proves to be a strategic ally in the sustainable management of urban resources. By optimizing resource management and

## **Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis**

encouraging citizen engagement, these technologies can contribute to creating resilient and ecologically efficient urban ecosystems (Ugochukwu et al., 2024).

Bibliometric analysis provides a systematic perspective on FinTech's contributions to addressing climate change, highlighting not only research trends but also collaboration networks and the academic impact of various works. Recent studies reflect a significant increase in interest in this subject, especially in the context of sustainable development goals and global commitments under the Paris Agreement.

Over the past two decades, literature on the use of FinTech for climate solutions has grown exponentially. This growth is driven by accelerated technological development and social pressure for sustainable solutions. Recent bibliometric analyses show that most publications on this topic originate from countries with advanced digital infrastructure, such as China, the United States, and European Union member states (Wen & Liu, 2023).

In the context of an unprecedented climate crisis and a rapid digital revolution, FinTech has emerged as an essential catalyst for innovative solutions in the transition to sustainability. This intersection between financial technology and climate objectives presents unprecedented opportunities to mobilize resources, improve financial efficiency, and support social inclusion in ways that directly contribute to reducing environmental impact. Recent studies highlight the crucial role of FinTech in facilitating access to environmentally friendly financial tools, such as renewable energy project financing, blockchain-based emissions trading, and the integration of ESG principles into investments.

To fully understand the scope and dynamics of this emerging field, a rigorous methodological approach is essential. Bibliometric analysis, as a research method, not only identifies publishing trends and the most influential authors but also provides a deeper understanding of collaboration networks and future research directions. Accordingly, the following chapter details the methodology employed in this study, describing the process through which relevant literature was systematically analyzed to highlight FinTech's key contributions to climate solutions. This approach provides a solid foundation for interpreting the results and exploring this interdisciplinary subject in depth.

### **Methodology**

The bibliometric analysis presented in this study was conducted to explore the intersection of fintech and climate issues using a systematic and rigorous approach for data collection, processing, and interpretation. The methodology was designed to ensure a comprehensive analysis of the specialized literature, enabling the identification of trends, relationships, and central themes in the field.

The database for this study was created using the Web of Science platform, one of the most prestigious and widely used academic indexing sources, recognized for its extensive coverage and high-quality data. The process of identifying relevant articles included several distinct stages:

#### **➤ Establishing selection criteria:**

To ensure the relevance of the results, two main categories of search terms were defined:

1. Terms describing financial technologies (fintech): fintech and financial technologies.
2. Terms describing climate issues, including: climate change, global warming, carbon emissions, sustainable development, green finance, environmental sustainability, renewable energy, decarbonization,

climate risk, climate resilience, net-zero, environmental impact, circular economy, biodiversity loss, and carbon footprint.

➤ Search procedure:

Searches were performed using combinations of terms from the two categories. For example, for each fintech-related term (fintech or financial technologies), searches were conducted in combination with climate-related terms. Thus, the searches included expressions such as *fintech AND climate change*, *financial technologies AND global warming*, or *fintech AND carbon emissions*.

➤ Filtering results:

The search results were filtered to eliminate irrelevant articles. Only documents published in indexed journals that met quality and relevance criteria were selected, including the subject of interest, the academic nature of the publication, and the accessibility of complete information about the document.

After collecting the articles, the database, covering the period 2016–2024 and including a total of 195 documents published across 81 different sources, was processed using *Biblioshiny*, an interactive and intuitive extension of the R package *Bibliometrix*. The data contained information about the articles, such as titles, authors, keywords, year of publication, number of citations, publishing journals, and affiliated institutions. To ensure the accuracy of the analysis, the data was cleaned to remove potential errors (e.g., duplicates) and to standardize information. Additionally, incomplete or irrelevant records were excluded.

The use of *Biblioshiny* facilitated a rigorous and comprehensive analysis of the literature. Its intuitive interface allowed for the seamless integration of data and the execution of complex analyses without requiring extensive programming skills. Moreover, its advanced visualization features ensured a clear presentation of the results.

Despite the rigorous methodology, there are some limitations to this approach. The exclusive use of the Web of Science platform may exclude relevant articles from other databases. Furthermore, while the selection of keywords was extensive, it might omit emerging or less obvious related topics.

## Results

Figure 1. Data base summary



Source: Authors' own processing using the Biblioshiny application

The bibliometric analysis data highlights a rapidly expanding field, with an impressive annual growth rate of 61.6% in publications over the period 2016–2024. This growth reflects a growing interest among researchers, suggesting that the analyzed topic is an emerging one with significant academic and practical potential. Additionally, with a

## Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

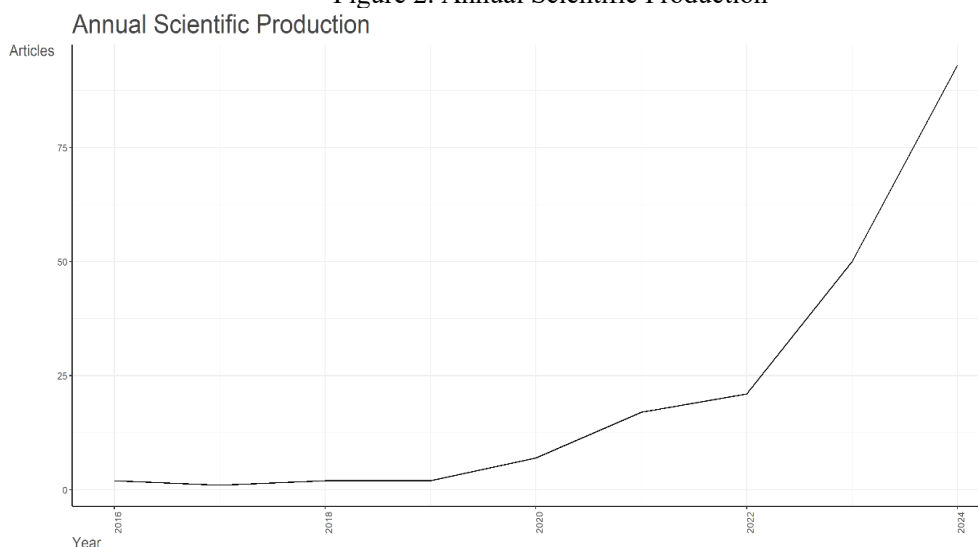
total of 195 documents published in 81 distinct sources, the studied field benefits from a notable diversity of dissemination channels, including journals, books, and other types of publications.

The academic impact of these works is considerable, with an average of 26.89 citations per document, indicating a significant influence within the scientific community. Furthermore, the large number of references cited—over 10,000—demonstrates a solid foundation of pre-existing literature, contributing to the validity and relevance of the research in this domain.

Collaboration among researchers is another remarkable aspect of this field. With a total of 603 authors involved and an average of 3.39 co-authors per document, there is a clear trend of cooperation at both local and international levels. Approximately 44.62% of the papers result from international collaborations, underscoring the global nature of the issues addressed and the need for an integrated perspective to tackle the analyzed challenges.

From a thematic perspective, the diversity is evident, with 327 terms from Keywords Plus and 494 keywords provided by the authors. This variety indicates a broad exploration of related topics and reflects the interdisciplinary nature of the research. The predominance of articles (168 out of 195 documents) demonstrates that academic journals are the primary publishing medium, although other types of works, such as book chapters and early access papers, also contribute to the diversity of dissemination channels.

Figure 2. Annual Scientific Production



Source: Authors' own processing using the Biblioshiny application

The annual analysis of scientific output on fintech and climate issues shows rising academic interest, as the intersection of financial technology and sustainability gains global importance.

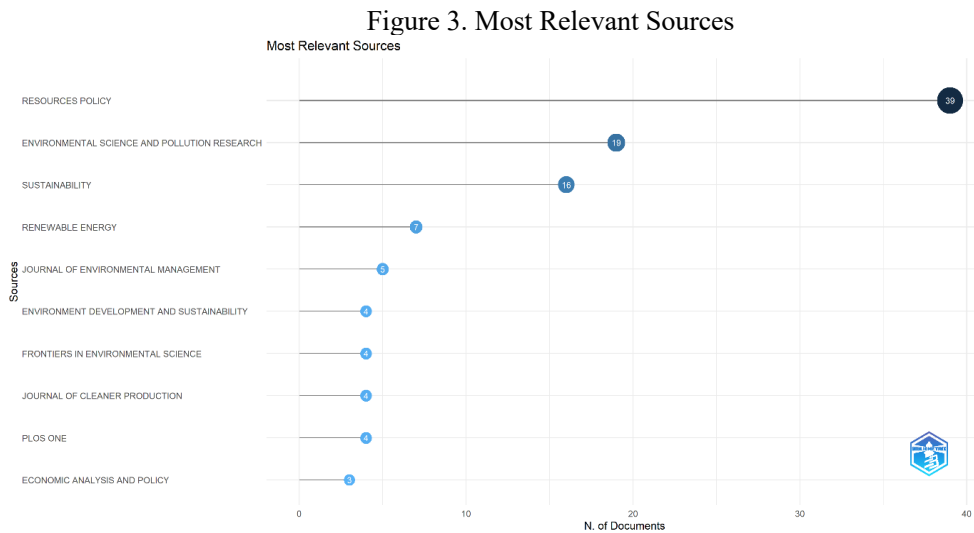
From 2016 to 2019, only 1–2 articles were published annually, reflecting the field's early stage when fintech was mainly viewed as a financial innovation, not yet linked to climate solutions.

In 2020, publications rose to 7, signaling a shift as fintech began to be recognized for its role in sustainable finance, carbon markets, and green investments.

Steady growth continued in 2021 (17 articles) and 2022 (21 articles), with expanding research topics including blockchain for carbon transactions and crowdfunding for renewable energy.

A major jump occurred in 2023 with 50 articles, nearly doubling the previous year, driven by global climate targets and tech advances. In 2024, a record 93 articles solidified the field as a key research area, attracting diverse scholars.

This trend underscores fintech's growing potential in climate action and the urgency of innovative, tech-driven solutions to environmental challenges.



Source: Authors' own processing using the Biblioshiny application

The chart of key sources on fintech and climate issues reveals the field's thematic diversity and interdisciplinarity, showcasing how fintech supports sustainability and climate action.

Resources Policy leads with 39 articles, linking fintech to natural and economic resource management, highlighting the importance of economic and policy perspectives in climate-related fintech applications.

Environmental Science and Pollution Research (19 articles) focuses on technical and scientific aspects, such as using fintech for pollution monitoring, carbon markets, and clean energy financing.

Sustainability (16 articles) reflects the field's holistic nature, addressing financial innovation, energy transition, and fintech's role in achieving sustainable development goals.

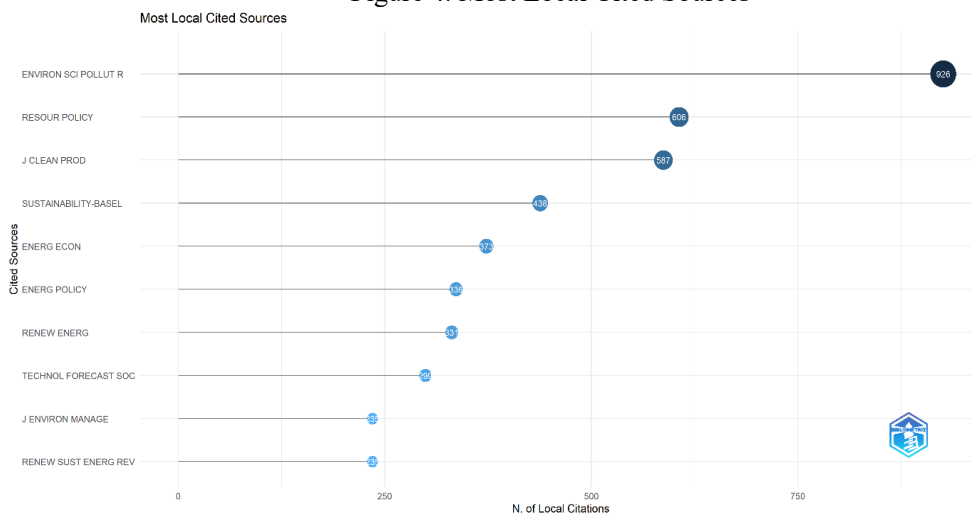
Renewable Energy (7) and Journal of Environmental Management (5) emphasize practical applications in renewable energy and resource management, showing fintech as a driver for low-carbon transition.

Journals like Environment Development and Sustainability, Frontiers in Environmental Science, and Journal of Cleaner Production (each with 4 articles) highlight fintech's role in sustainable development and clean production.

## Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

Other sources such as PLOS ONE and Economic Analysis and Policy demonstrate the research diversity, covering scientific, economic, and policy-oriented approaches to fintech and climate challenges.

Figure 4. Most Local Cited Sources



Source: Authors' own processing using the Biblioshiny application

The chart on the most locally cited sources reveals the foundational journals shaping research at the intersection of fintech and climate issues.

Environmental Science and Pollution Research leads with 926 citations, underscoring the importance of fintech in pollution monitoring, reduction, and environmental management.

Resources Policy (606 citations) confirms the centrality of economic and resource management strategies, highlighting fintech's role in supporting the green economy.

Journal of Cleaner Production (587 citations) emphasizes fintech's impact on sustainable production and the circular economy, especially in financing clean projects and reducing supply chain emissions.

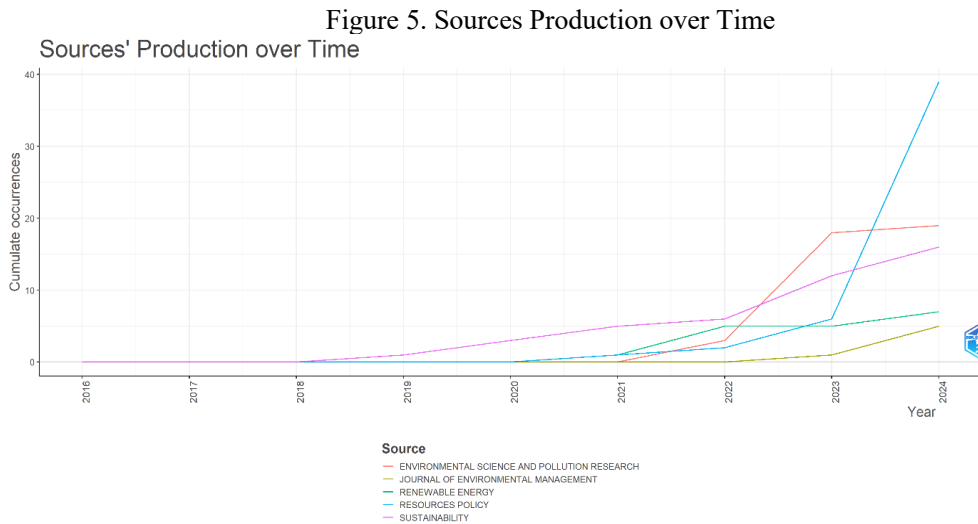
Sustainability-Basel (438 citations) reflects an interdisciplinary focus on sustainable development, including topics like green crowdfunding and blockchain for resource management.

Energy Economics (373) and Energy Policy (336) highlight fintech's role in financing and regulating renewable energy and energy efficiency initiatives.

Renewable Energy (331) and Renewable and Sustainable Energy Reviews (235) link fintech to clean energy investment and adoption.

Technological Forecasting and Social Change (299) points to fintech's potential in forecasting and addressing social and climate challenges through innovation.

Journal of Environmental Management (235) highlights fintech's role in monitoring and optimizing environmental impacts.



Source: Authors' own processing using the Biblioshiny application

The graph showing source production over time highlights the growing academic interest in fintech's role in addressing climate issues.

From 2016 to 2018, no articles were published, reflecting the field's early absence. In 2019, the first article appeared in *Sustainability*, signaling initial exploration. By 2020, interest increased slightly with three articles in the same journal.

In 2021, diversification began: *Resources Policy* and *Renewable Energy* published their first articles, indicating broader attention to renewable energy and policy implications.

In 2022, growth accelerated with more articles in *Environmental Science and Pollution Research*, *Renewable Energy*, and *Sustainability*. *Resources Policy* also became more active, reflecting rising interest in policy and economic angles.

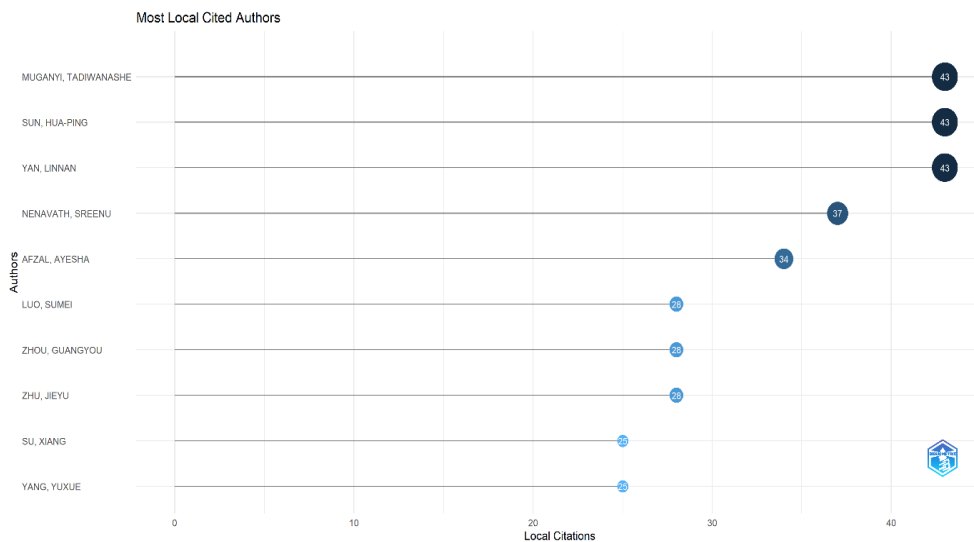
A major shift occurred in 2023: *Environmental Science and Pollution Research* published 18 articles, *Resources Policy* 6, and *Sustainability* and *Renewable Energy* remained strong contributors. This marked the field's maturation and interdisciplinary appeal.

In 2024, *Resources Policy* led with 39 articles, cementing its role in economic and environmental policy research. *Environmental Science and Pollution Research* (19), *Sustainability* (16), *Renewable Energy* (7), and *Journal of Environmental Management* (5) also saw notable growth.

The sharp rise in publications reflects the field's rapid development and the increasing focus on fintech-driven solutions for climate challenges and the green economy transition.

## Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

Figure 6. Most Local Cited Authors



Source: Authors' own processing using the Biblioshiny application

The graph on the most locally cited authors highlights the key researchers shaping studies on fintech and climate issues, forming the theoretical and methodological foundation of the field.

Muganyi Tadiwanashe, Sun Hua-Ping, and Yan Linnan top the list with 43 citations each, indicating their pivotal role in topics like sustainable finance, carbon markets, and green fintech development.

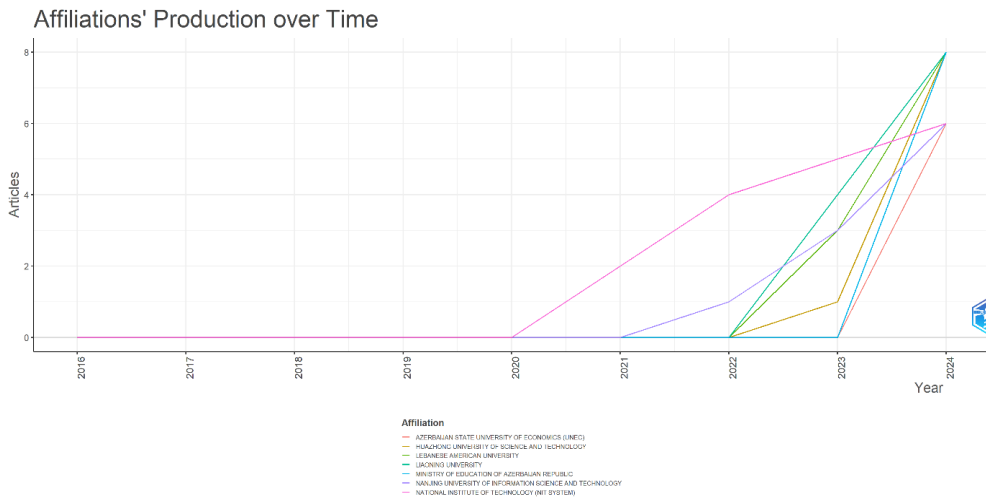
Nenavath Sreenu (37 citations) and Afzal Ayesha (34) follow, suggesting strong interest in their work, likely focused on fintech applications in renewable energy and climate risk assessment.

Luo Sumei, Zhou Guangyou, and Zhu Jieyu (28 citations each) also show significant influence, contributing to understanding fintech's role in resource management and green investments.

Su Xiang and Yang Yuxue (25 citations each) are notable for their work on carbon reduction and regulatory strategies in sustainable fintech.

These frequently cited authors are central to local research, their work shaping current academic directions and highlighting core themes in the fintech–climate nexus.

Figure 7. Affiliations' Production over Time



Source: Authors' own processing using the Biblioshiny application

The graph on institutional production over time reveals growing academic engagement in research on fintech and climate issues, especially in recent years.

From 2016 to 2020, no institutional contributions were recorded, indicating the field was not yet a research focus. In 2021, the National Institute of Technology (NIT System) published the first two articles, marking the field's academic emergence.

In 2022, output increased slightly, with four more articles from NIT and one from Nanjing University of Information Science and Technology, signaling early expansion.

A notable rise occurred in 2023, as NIT published five articles and institutions like Liaoning University (4) and Lebanese American University (3) joined, reflecting broader interest and diversification.

2024 saw a major surge: Huazhong University of Science and Technology, Lebanese American University, Liaoning University, and the Ministry of Education of Azerbaijan Republic each published eight articles. NIT and Azerbaijan State University of Economics (UNEC) followed with six each, confirming their strong research engagement.

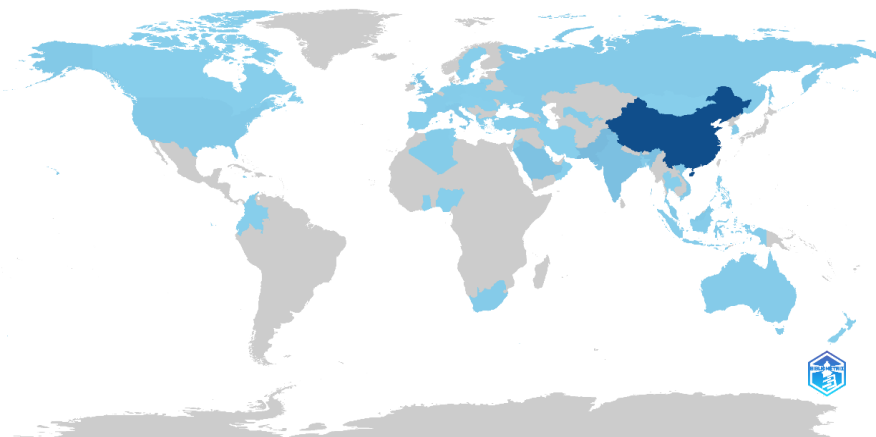
This expansion demonstrates the global relevance of fintech-climate research, with institutions from Azerbaijan, China, and Lebanon playing key roles. NIT, active since 2021, stands out as a pioneer, helping establish the field's foundation.

Overall, the data highlights a maturing research domain and emphasizes the growing importance of international collaboration in addressing climate challenges through fintech.

## Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

Figure 8. Country Scientific Production

Country Scientific Production



Source: Authors' own processing using the Biblioshiny application

The analysis of scientific production by country reveals a strong global interest in fintech's role in addressing climate issues, with notable regional contributions and international collaboration.

China leads with 278 articles, establishing itself as the global leader. This reflects its strategic focus on integrating fintech into green economy policies, supported by advanced tech infrastructure and sustainability-driven agendas.

Pakistan (42 articles) and India (30) show strong engagement in South Asia, likely driven by regional challenges such as pollution, food security, and the need for energy transition.

In the Middle East, countries like Saudi Arabia (26), Bahrain (5), and Qatar (3) are increasingly active, reflecting efforts to diversify their economies and invest in green fintech initiatives.

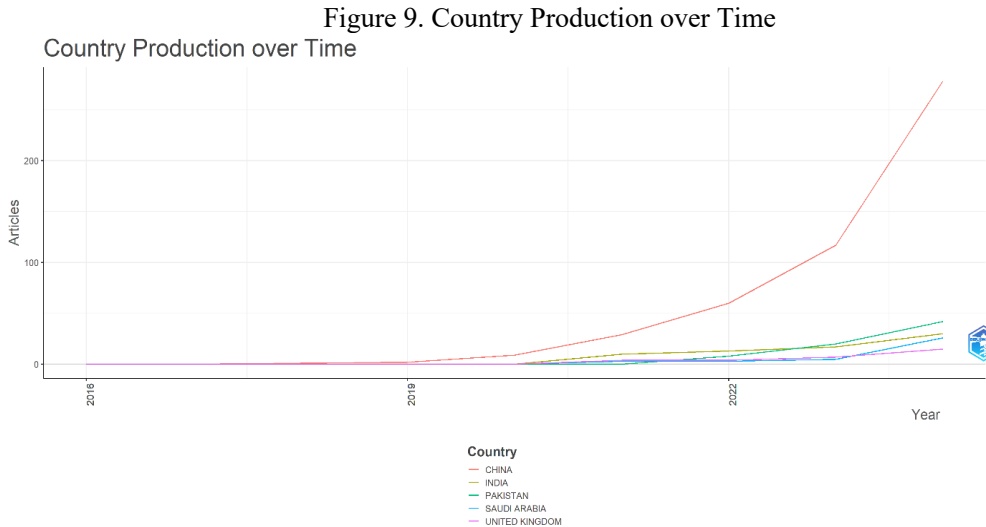
Western countries including the UK (15), Italy (13), USA (11), and France (7) contribute meaningfully. While their volume is lower, their research often carries significant impact, supported by strong academic infrastructure.

Emerging contributors like Azerbaijan, Lebanon, Russia, South Korea, and Vietnam (each with 9 articles) point to growing interest in fintech–climate research, often linked to international projects or regional collaborations.

Countries with smaller but notable outputs—such as Romania, Algeria, Germany, and Sweden (2–6 articles)—suggest potential future research hubs.

Unique contributions from Ghana, Lithuania, Singapore, and New Zealand reflect the truly global spread of interest, even at a symbolic level.

Overall, the data shows concentrated leadership from China, growing participation from emerging economies, and broad international collaboration—highlighting fintech's global relevance in tackling climate challenges.



Source: Authors' own processing using the Biblioshiny application

The graph highlights rapid global growth in academic research on fintech and climate issues, with China leading decisively. After minimal output in 2018–2019, China's production surged: 9 articles in 2020, 29 in 2021, 60 in 2022, 117 in 2023, and 278 in 2024. This exponential growth reflects strong institutional support, policy focus, and research investment in sustainability and fintech integration.

India began contributing in 2021 (10 articles), with steady growth to 13 in 2022, 17 in 2023, and 30 in 2024, showing rising academic interest in fintech solutions for climate challenges like pollution and energy transition.

Saudi Arabia entered the field in 2021 (3 articles), maintained that output in 2022, then grew to 5 in 2023 and 26 in 2024. This sharp rise aligns with national initiatives like Vision 2030 and the shift toward economic diversification and sustainability.

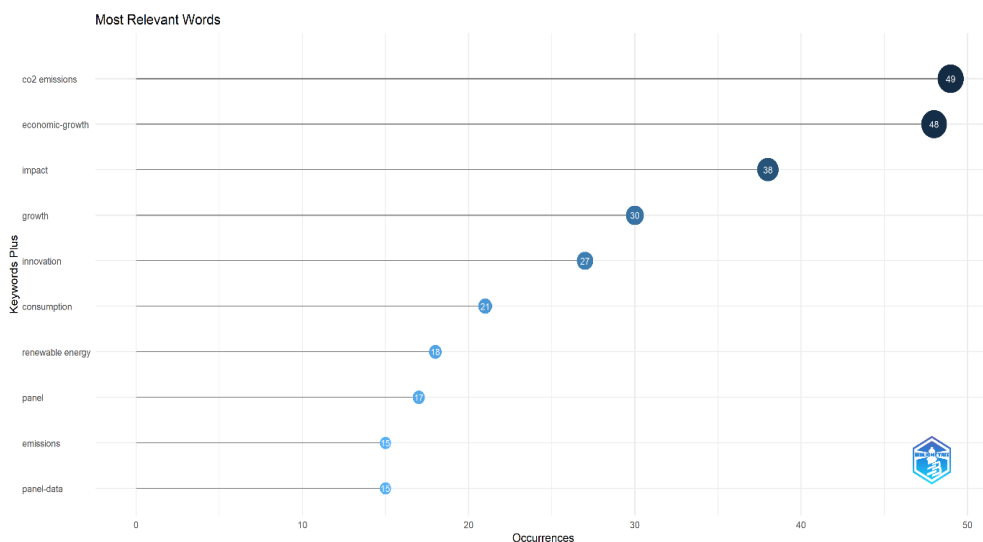
The United Kingdom started in 2021 with 4 articles, followed by consistent growth: 4 in 2022, 7 in 2023, and 15 in 2024. This reflects its strong research tradition and interest in fintech's role in sustainable finance and public policy.

Pakistan joined the field in 2022 (8 articles), with significant growth to 20 in 2023 and 42 in 2024. This rapid increase suggests strong academic engagement with fintech's potential to address regional climate vulnerabilities and infrastructure challenges.

Overall, the data shows China at the forefront, with other countries—especially India, Pakistan, Saudi Arabia, and the UK—expanding their contributions. This global spread reflects both diverse national priorities and a shared interest in fintech-driven climate solutions. The rise of emerging economies in this research area suggests a democratization of knowledge and increased international collaboration.

## Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

Figure 10. Most Relevant Words



Source: Authors' own processing using the Biblioshiny application

An analysis of the most frequent terms reveals the main themes in literature on fintech and climate issues: economic impact, innovation, and sustainability.

- CO2 emissions tops the list with 49 mentions, emphasizing its central role in fintech-related climate research—particularly in areas like carbon markets and green financing.

- Economic growth appears 48 times, showing strong interest in how fintech can drive sustainable development.

- Impact (38 mentions) reflects the broad effects of fintech across climate, economy, and innovation.

- Growth (30 mentions) supports this, also pointing to fintech adoption and renewable energy expansion.

- Innovation, cited 27 times, underlines the importance of tools like blockchain, crowdfunding, and digital platforms in addressing climate challenges.

- Consumption (21 mentions) signals concern for environmental effects of consumer behavior, with fintech positioned to track and influence it.

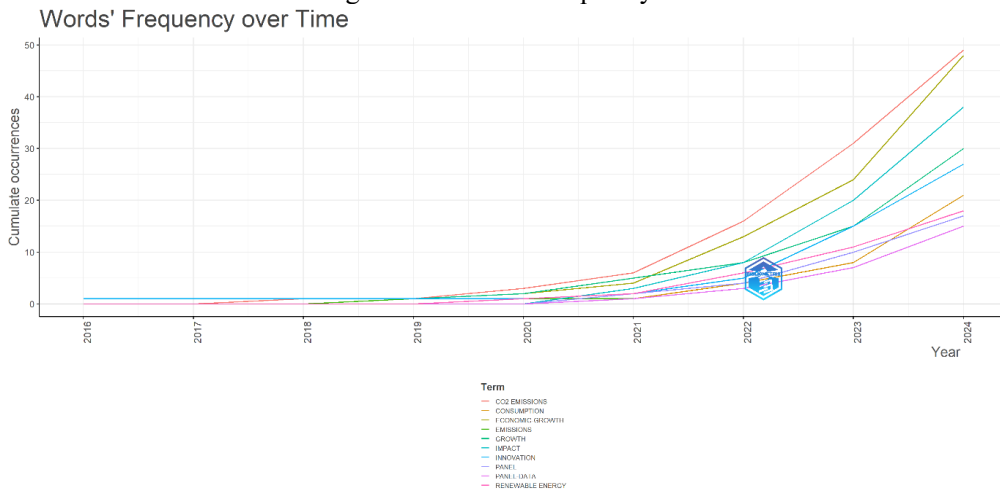
- Renewable energy (18 mentions) highlights fintech's role in financing clean energy initiatives.

- Panel (17) and panel data (15) indicate frequent use of quantitative methods to analyze tech-climate-economic links.

- Emissions, mentioned 15 times, reiterates the focus on pollution reduction.

Overall, the dominant terms reflect key research priorities: cutting emissions, advancing innovation, fostering green growth, and applying empirical, interdisciplinary approaches.

Figure 11. Words' Frequency over Time



Source: Authors' own processing using the Biblioshiny application

The graph depicting the frequency of words over time provides a clear view of the evolving academic interest in key themes within the domain of fintech and climate issues. The data analysis highlights both consistent growth and shifts in research priorities.

In the early years (2016–2018), the frequency of terms is very low, indicating an initial academic interest in this domain. Terms such as *growth* and *innovation* appear only once per year, suggesting that early research focused on innovation and growth as factors of technological development, without explicitly addressing connections to climate issues.

Starting in 2019, terms like *CO2 emissions*, *economic-growth*, and *emissions* begin to appear more frequently, reflecting an expansion of research into sustainability and climate impact themes. This indicates that fintech was starting to be recognized as a potential tool for reducing emissions and supporting sustainable economic growth.

In 2020 and 2021, the increase in the use of terms becomes more pronounced. *CO2 emissions* rise from 1 to 6 occurrences, while *economic-growth* and *growth* become increasingly frequent topics. Terms such as *renewable energy* and *panel* also start to be used more often, suggesting that research is becoming more complex, integrating themes like renewable energy and the use of quantitative methodologies to analyze empirical data.

A major shift is observed during the 2022–2024 period, when the frequency of all terms increases dramatically. *CO2 emissions* become the most frequent term in 2024 (49 occurrences), reflecting the dominant concern of researchers with reducing carbon emissions. *Economic-growth* (48 occurrences) and *impact* (38 occurrences) highlight the focus on the relationship between fintech, sustainable economic growth, and environmental effects.

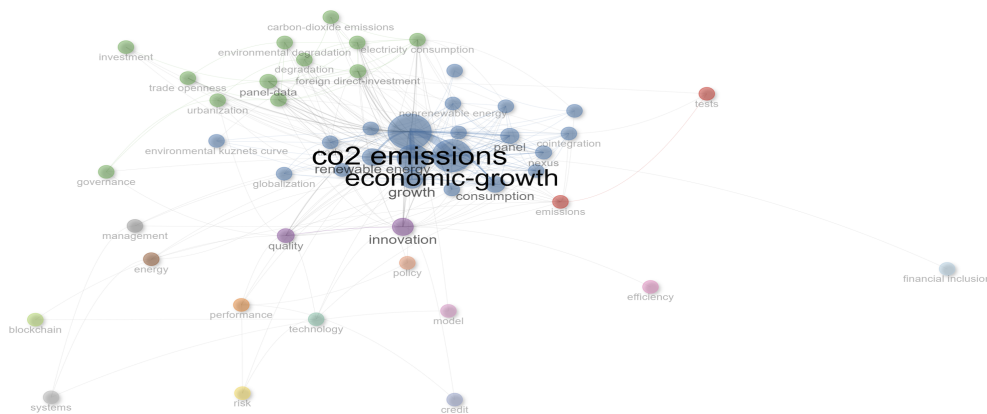
Terms like *innovation* (27 occurrences), *consumption* (21 occurrences), and *renewable energy* (18 occurrences) indicate a diversification of themes, focusing on new technologies, changes in consumption behaviors, and the transition to clean energy sources. The use of terms such as *panel* and *panel-data* (17 and 15 occurrences, respectively) show a consolidation of quantitative methodological approaches, emphasizing that the research is supported by rigorous analyses.

In conclusion, the analysis of word frequency over time demonstrates the evolution of the field from limited interest to a broad and sophisticated exploration of the

## Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis

links between fintech, innovation, and sustainability. The dramatic increase in terms like *CO2 emissions* and *economic-growth* in recent years reflects a continuously expanding academic interest and the growing relevance of these topics in the context of climate change.

Figure 12. Co-occurrence Network



Source: Authors' own processing using the Biblioshiny application

The co-occurrence network figure illustrates the conceptual structure of the field, with major terms organized into interconnected clusters. Larger and more central nodes, such as *CO2 emissions* and *economic-growth*, indicate their fundamental importance in the literature. These terms act as nodal points linking various themes, emphasizing their central role in understanding the connection between fintech and climate issues.

The central cluster, formed around the terms *CO2 emissions*, *economic-growth*, *renewable energy*, and *growth*, reflects the main themes of the research. Their high frequency and multiple connections with other terms suggest that the research focuses on the relationship between CO2 emissions, economic development, and the transition to renewable energy sources. Terms such as *consumption*, *impact*, and *panel-data* contribute to the diversification of analyzed topics, highlighting the use of quantitative methodologies to study these phenomena.

The term *innovation*, situated in a slightly separate area, indicates a cluster related to the role of technological innovation. Its connections to central terms suggest that innovation is considered a crucial driver for solving climate issues through fintech.

Terms such as *panel-data*, *foreign direct investment*, and *electricity consumption* indicate the presence of a secondary cluster reflecting the use of empirical data and the relationship between investments, energy consumption, and climate impact. This cluster suggests a focus on applied studies and economic analyses.

Peripheral terms, such as *blockchain*, *financial inclusion*, and *policy*, point to emerging research directions. These highlight interest in specific technologies and regulatory frameworks, which are still in the early stages within this field.

The multiple links between terms demonstrate a high degree of interdependence among themes and suggest an interdisciplinary approach. The figure indicates that the field is well-structured around a few key concepts but continues to expand to include new research directions. In conclusion, the network reflects a mature and evolving field, with

a clear focus on carbon emissions, economic growth, and innovation, but with significant potential for growth in emerging areas such as blockchain and financial inclusion.

### **Conclusions**

FinTech has emerged as a critical tool in addressing climate challenges, offering innovative solutions for financing green projects, reducing carbon emissions, and embedding sustainability principles into the global economy. The bibliometric analysis presented in this study underscores an exponential growth in academic interest in the intersection of FinTech and climate issues, highlighting its potential to contribute to sustainable development goals.

One of the major advantages of FinTech lies in its ability to support renewable energy projects through crowdfunding and other innovative financing methods. Additionally, blockchain technologies play a pivotal role in carbon trading, providing a transparent and efficient framework for reducing global emissions. By integrating ESG data into decision-making processes, investments become more responsible, further advancing the transition to a green economy.

The findings of this study reveal a significant increase in global academic engagement with this topic, as evidenced by the bibliometric analysis. The sharp rise in annual publications, with a growth rate of 61.6%, reflects a burgeoning recognition of the importance of FinTech in climate action. Contributions from countries such as China, India, and the European Union demonstrate a wide geographical spread of research efforts, emphasizing the global relevance of this emerging field.

Moreover, the analysis highlights the diversification of themes within the literature, spanning areas such as carbon markets, renewable energy investments, and sustainable finance. This thematic breadth reflects the interdisciplinary nature of the research and underscores FinTech's capacity to address complex climate challenges from multiple angles.

However, challenges persist, particularly in regulatory frameworks and financial inclusion. Policymakers must adapt regulations to foster technological innovation while safeguarding user protection and reducing inequalities. Furthermore, collaboration across disciplines and sectors remains essential to maximize FinTech's impact on climate solutions.

In conclusion, the literature indicates that interest in the intersection of FinTech and climate issues has grown significantly, positioning FinTech not only as a technological innovation but as a vital enabler of global sustainability efforts. Future research should prioritize integrated and interdisciplinary approaches to accelerate the adoption of sustainable solutions on a global scale.

### **Authors' Contributions:**

The authors contributed equally to this work.

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### Acknowledgement

This work was supported by a grant from the Romanian Ministry of Research, Innovation and Digitalization, the project with the title „Economics and Policy Options for Climate Change Risk and Global Environmental Governance” (CF 193/28.11.2022, Funding Contract no. 760078/23.05.2023), within Romania's National Recovery and Resilience Plan (PNRR) - Pillar III, Component C9, Investment I8 (PNRR/2022/C9/MCID/I8) - Development of a program to attract highly specialised human resources from abroad in research, development and innovation activities.

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### Article Info

*Received:* March 26 2025

*Accepted:* May 24 2025

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### How to cite this article:

Spulbar, A. C., Trasca, O. M. (2025). Unveiling The Growing Role of Fintech in Tackling Climate Challenges. A Bibliometric Analysis. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 225 – 241.



## ORIGINAL PAPER

# Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers

Aaliya Ashraf<sup>1)</sup>, Ulfat Andrabi<sup>2)</sup>,  
Virgil Popescu<sup>3)</sup>, Ramona Birau<sup>4)</sup>

### Abstract:

**Purpose:** the purpose of this study is to find out how various dimensions of Cultural Intelligence (CQ) impact the Job Satisfaction (JS) of teachers teaching in multi-cultural classroom settings.

**Design/methodology/approach:** A quantitative approach has been used wherein data has been collected from 250 teachers working various Private Universities of India having a substantial foot fall of international students.

**Findings:** The findings show that cultural intelligence significantly and favorably affects university instructors' Job Satisfaction. This shows that there is a direct correlation between university professors' job satisfaction and their level of cultural intelligence. These results also highlight the significance of cultural competence in raising job satisfaction in the education sector.

**Originality/value:** this paper provides insights about the importance of Cultural Intelligence among teachers. Therefore the policies regarding same can be formulated and also CQ aspect can also be considered at the time of hiring the teachers at various institutions.

**Keywords:** *cultural intelligence, job satisfaction, cultural obstacles, organizational culture, globalization, multicultural diversity.*

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## **Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers**

### **Introduction**

As we move from the information age to the digital era in the twenty-first century, enterprises must contend with fierce competition to maintain their profitability, relevance, and efficiency. They are going national more and more in an effort to improve company growth, profitability, and success. Organizations are forced by this global rivalry to rethink their goals and take on rivals from across the globe. Human capital is the main factor that determines an organization's effectiveness when it operates on a global scale. Organizations cannot rely just on employees' conceptual, technical, and interpersonal abilities to help them succeed in varied cultural situations where values and priorities of life differ (Thomas & Inkson, 2017). To successfully navigate and thrive in these many cultural environments, they demand people with high degrees of cultural intelligence. Culturally intelligent managers are the primary drivers of success for organizations operating in diverse cultural contexts (Gokalp, 2021). This is because only managers with high levels of cultural intelligence can instill cultural intelligence within the organization, fostering cultural synergy and creating an organizational culture that promotes job satisfaction among employees from varied cultural backgrounds while reducing turnover intentions.

Even with all of the positive effects of globalization like improvements in media, technology, communication, and digitization managing cultural differences in the workplace continues to be difficult (Akhal & Liu, 2019; Thomas & Inkson, 2017). Research shows that cultural differences cause over 70% of foreign ventures to fail (Livermore, 2011). Insufficient management of these discrepancies leads to lower staff performance and well-being, unhappy customers, and ultimately lower productivity inside the company. As a result, managing multicultural diversity inside organizations efficiently has become essential to the effectiveness of those firms. Fostering cultural synergy is the main goal of intercultural management, which comprises utilizing cultural variety within firms while minimizing any negative effects resulting from such differences (Peterson, 2004). Fostering cultural synergy and successfully managing cultural diversity within organizations requires making use of creative and excellent offerings and solutions originating from different cultural backgrounds, while also tackling the differences that might develop among employees due to cultural variations (Nemeth, 1992). However, a high level of cultural intelligence is required to properly navigate these cultural disparities (Ang & Van Dyne, 2008).

Similarly, scholars who study teacher preparation stress the significance of teachers gaining a "sociocultural consciousness." To do this, teachers must be aware of how their own sociocultural backgrounds affect the way they engage with children. Essentially, educators are urged to admit that their experiences and cultural contexts have impacted their perspectives. Additionally, cultivating this awareness helps teachers to successfully traverse a variety of classroom environments, encouraging tolerance and understanding among students from different cultural backgrounds (Banks et al., 2005). It is the responsibility of educators to address educational disparities and advocate for the needs of their students (Banks et al., 2005, p. 233). Quintanar-Sarellana (1997) found that teachers who are not culturally aware may either be unaware of the differences between their students' cultures and the school setting, or they may openly or subtly disregard their students' cultural backgrounds. This research focused on teachers working with Culturally and Linguistically Diverse (CLD) students. It's also critical to understand that cultural

insensitivity on the part of educators can take many different forms, which could impede CLD students' ability to receive effective instruction and learning opportunities.

According to Alexander and Schofield (2006ab), teachers' unconscious biases might negatively affect their students' educational experiences by ignoring their academic demands. On the other hand, teachers who are culturally aware are better able to understand the backgrounds of their students, incorporate different cultures into the classroom, and use a variety of teaching strategies to help kids learn. Additionally, instructors who are culturally competent tend to be self-reflective and professional development-oriented, which helps them build meaningful relationships with their pupils (Quintanar-Sarellana, 1997). These teachers take the initiative to look for ways to improve their cultural competency, which helps to create a welcoming and encouraging learning environment where all children can succeed.

The purpose of this study is to find out how CQ impacts JS of teachers at in multi-cultural classroom settings. There is no substantial study done with regards to CQ of teachers. Most of the studies have been conducted with respect to international business and performance of expatriates (Ramalu et al., 2011). Therefore, this study fills the gap by conducting a research on the importance of CQ in teachers and how it impacts their JS. This study is highly needed given the diversity in classrooms. International students are also enrolled in many universities of India. To take care of their needs and sentiments culturally intelligent teachers are highly required so as to make them feel welcome and comfortable at the same time.

### **Literature Review**

#### ***Theoretical Background***

Culture can be thought of as our individual lens through which we view the world. It is the common mental framework that sets one civilization apart from another, according to Dutch psychologist Geert Hofstede (Hofstede, 1991). Culture is usually defined by national or regional origins in educational and psychological research. For example, "Western culture" is defined as that which is observed in the United States, Canada, and Western Europe; "East Asian culture" is defined as that which is found in China, Japan, and South Korea. National or regional cultures can differ in aspects like language, traditions, norms, and values. Yet, it's crucial to recognize that each individual encompasses multiple cultural influences, including national origin, ethnicity, affiliations with organizations and professions, gender, generation, sexual orientation, socioeconomic status, religious beliefs, and various other factors.

Teachers need to show that they care about and respect pupils of color. One good way to do this is by implementing culturally responsive teaching practices. Culturally responsive teaching, according to Gay (2002), is making appropriate use of the cultural characteristics, experiences, and perspectives of a varied student body in order to improve their learning. Students are given multiple opportunities to demonstrate their comprehension, difficult conversations are welcomed as learning opportunities, and teachers and students work together as a collaborative team in a classroom that is culturally responsive. Teachers can increase their influence on pupils by using alternative strategies such as establishing high standards, encouraging good attitudes of parents and families, and working together to create relevant lesson plans.

#### ***Cultural Intelligence***

Understanding intercultural competency underwent a substantial shift with the introduction of the concept of cultural intelligence. Intercultural competence, as described by Hammer, Bennett, and Wiseman (2003) as the capacity to reason and behave

## **Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers**

appropriately in cross-cultural circumstances, was one of the movement's initial concepts. To put it precisely, it entails using one's knowledge, abilities, and character traits to communicate with people of other national and cultural origins both locally and abroad (Johnson, Lenartowicz, & Apud, 2006). More than 30 intercultural competence models and more than 300 personal traits that have been linked to intercultural competence have emerged over time in the field (Leung, Ang, & Tan, 2014). According to Raver & Van Dyne (2018), there are three main categories for cultural competence research. The first section focuses on intercultural competence from an individual perspective, characterizing competence in terms of traits like cognitive complexity and open-mindedness. The second domain pertains to intercultural attitudes and worldviews, which include general perspectives and notions such as ethnocentric and ethno relative worldviews. Another area of study focuses on the idea of intercultural competence as a set of competencies, such as the skills and knowledge needed to successfully negotiate cross-cultural situations.

The intercultural competency research field has been criticized for what is seen to be a weak theoretical foundation (Ang et al., 2007). Ang et al. developed a theoretical framework known as cultural intelligence in response to this criticism. Furthermore, Earley & Ang (2003) created the Cultural Intelligence Scale (CQS), which has been shown to have predictive validity in a variety of areas, including intercultural adjustment, athletic performance, leadership, team trust, and athletics (Ang et al., 2007; Ang, Van Dyne, & Rockstuhl, 2015). Due to the increasing globalization and workforce diversification, the cultural intelligence (CQ) paradigm has received a lot of attention in psychology, especially in industrial/organizational psychology (Van Dyne et al., 2012). Cultural intelligence is the ability to function well in cross-cultural settings, including the ability to work well in teams with people from different cultural origins both domestically and abroad (Earley & Ang, 2003). This ability is essential for determining how we connect with other people.

While the framework for cultural intelligence has mostly been studied in the context of business, its growing popularity can be due to its succinct integration of four dimensions, which provide a more thorough connection to more general abstract ideas. This is in contrast to earlier cross-cultural measures that, as Matsumoto and Hwang's (2013) assessment points out, have been criticized for their uneven factor structures and lack of validity. A set of intercultural competencies that demonstrate a person's capacity to function well in cross-cultural settings is known as cultural intelligence (CQ) (Ang & Van Dyne, 2008; Earley & Ang, 2003). As a result, CQ supports the viewpoint that views intercultural competence as a collection of abilities.

The four main components of Cultural Intelligence (CQ) are motivation/drive, knowledge/cognitive, strategy/metacognitive, and action/behavioral. Remarkably, those with the highest levels of cultural intelligence might not always be CEOs, multilingual people, or regular travelers (Livermore, 2015). Instead, anyone who embodies the four themes listed below can set oneself apart from others in a big way. Moreover, it makes sense to assume that educators who score well on measures of cultural intelligence would be more effective and at ease when interacting with families and children from different backgrounds.

To be CQ Driven, one must exhibit a genuine interest in and dedication to cross-cultural issues. It also entails having the drive to continuously exert effort when negotiating cross-cultural situations or surroundings. A teacher who performed well in this area would be confident in their capacity to function well in a variety of contexts, which would improve their relationships with families and students. This kind of teacher

would be very motivated to learn about and interact with different cultures, and they would also have a strong sense of self-belief in their capacity to work well with people from different cultural backgrounds. When working with families, students, and extended family members from culturally diverse groups, these attributes are very important.

The ability to identify cultural parallels and differences is referred to as knowledge. A teacher who is very good at this would understand, for example, that Latin American Hispanic culture is very different from Latin-European culture. They may also be highly knowledgeable in areas such as social studies or have a deep comprehension of international economic systems. Additionally, they would understand of the ethnographic conflicts that exist in various civilizations. CQ Knowledge is essentially a better understanding of culture. It includes cognitive skills linked to basic cultural knowledge as well as particular cultural nuances, covering things like social conventions, economic systems, cultural customs, and important familial relationships in various cultural contexts.

The metacognitive component of CQ strategy, or the ability to plan and be conscious in cross-cultural situations, is what's meant by this term. This educator is capable of "thinking about thinking" in the context of cross-cultural communication. Cultural knowledge is something they can predict, evaluate, and understand proactively. This is more than just knowing facts about a particular culture; rather, a teacher who is good at this would be able to prepare for cultural interactions, stay conscious of these interactions, and then reflect on and make necessary adjustments to their presumptions about any differences in culture that may emerge. This ability gives educators the ability to take some control over how they think about cultural diversity.

The behavioral side of the idea is called Cultural Intelligence (CQ) Action, and it includes the ability to modify conduct in a variety of cultural contexts. A teacher with a high CQ Action would essentially be versatile in both verbal and nonverbal communication, as well as in their speaking patterns when interacting with people from different cultural backgrounds. Such a teacher would be able to communicate empathy and flexibility to their pupils and their families while also adjusting their delivery style with ease.

### ***Job Satisfaction***

It's critical to make sure the teachers we've carefully chosen feel good about their roles in the school if we want to keep them on board. Job satisfaction is a complex idea that is difficult to define simply. It is generally believed to represent the degree to which people respond favorably or unfavorably to their work experience. According to Stebbins (2008), total job satisfaction is not only an emotion but a perspective formed by a multitude of complex factors that culminate in an all-encompassing sense of general well-being gained from their interactions at work. Furthermore, a wide range of factors impact job satisfaction, such as independence, the nature of the work itself, interaction within the organization, financial compensation, chances for advancement, opportunities for growth and development, relationships with coworkers, the perceived importance of the work, the standard of supervision, feedback, and recognition, workload, and job demands. Stebbins (2008) has highlighted that factors such as organizational culture, the degree to which an employee's personal qualities and abilities align with the organization's values, the degree to which an employee's skills and requirements align with the organization, and even aspects of the employee's personal life all have a significant impact on job satisfaction. Kristoff-Brown, Zimmerman, and Johnson (2005) have provided a thorough analysis that highlights the strong evidence supporting the importance of different types of alignment

## **Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers**

in shaping attitudes and actions connected to one's job. It is imperative for employers to recognize and tackle these varied forms of alignment in order to attract and retain top-tier employees.

In the end, even if there are a lot of variables that affect instructors' job happiness, its importance comes from how it affects staff retention as well as employee efficacy and contentment. As explained by Benson (1998), turnover rates are considerably lower when work satisfaction is high. People who feel fulfilled and valuable in their professions are less likely to look for other alternatives. In order to reduce high-performing employees' intentions of leaving, Scroggins (2008) highlights the significance of promoting job satisfaction through meaningful work experiences and advises firms hoping to keep top talent to give priority to creating such experiences. Scroggins' statement emphasizes the importance of job satisfaction even while it acknowledges its complexity, especially in the context of teacher retention studies.

Liu (2005) emphasizes that job happiness affects organizational success in addition to job performance. Although Scroggins (2008) highlights the value of meaningful work in creating job happiness, the real significance is in how job satisfaction affects employee success in terms of retention, output, and willingness to participate in voluntary prosocial activities. The logic is simple: people who are happier in their jobs are more likely to be optimistic and productive employees. According to Erez and Judge (1994), there is a reciprocal relationship between job satisfaction and subjective well-being, with each feeding the other back in a cycle. The US Department of Education (1997) emphasizes that a teacher's career satisfaction has a major impact on the caliber and consistency of instruction that children get. Therefore, it is crucial to recognize and promote job satisfaction within our educational institutions in order to both retain competent instructors and boost their passion and efficacy in encouraging student learning. Therefore, the objective of this study is to find out the impact of various dimensions of CQ on JS of teachers.

### ***Cultural Intelligence and Job Satisfaction***

Just as adept management of cultural disparities, which correlates with cultural intelligence, holds significance for all types of organizations in terms of boosting employee job satisfaction and decreasing turnover intentions, it is equally crucial for educational institutions. Similar to individuals in other professions, school principals and teachers are shaped by cultural influences (Gokalp, 2021). Therefore, fostering cultural intelligence within educational settings is essential for promoting positive workplace experiences and retention among staff members.

### ***CQ Strategy and Job Satisfaction***

Effective management of cultural differences not only facilitates better understanding and communication among educators and students from diverse backgrounds but also cultivates a supportive and inclusive environment conducive to learning and professional growth. Additionally, as educational institutions increasingly serve diverse student populations, educators' ability to strategize in order to navigate cultural differences with sensitivity and proficiency becomes paramount for promoting student success and fostering a sense of belonging within the school community. Thus, integrating cultural intelligence practices within educational organizations is crucial for promoting overall organizational effectiveness and fulfilling their mission of providing equitable and quality education to all students.

*H1: CQ Strategy has a positive significant impact on Job Satisfaction of university teachers*

***CQ Knowledge and Job Satisfaction***

For teachers to be content with their jobs and change their minds about quitting, school principals must be aware of the cultural differences among their staff, know how to use these differences to improve employee well-being and organizational efficiency, and cultivate cultural synergy in the classroom. This requirement also applies to Turkish educational establishments. Considering that Turkey is situated at a crossroads between Eastern and Western cultures (Hofstede & Hofstede, 2005; House et al., 2004), it is important to remember that all cultures can be divided into two main categories: Eastern and Western. They also emphasized how Turkey combines elements of Eastern and Western culture. Consequently, Turkish school administrators need to be skilled in negotiating and accepting these cultural quirks in order to create a peaceful, encouraging atmosphere that promotes instructors' well-being and contentment in their work. Teachers in Turkey are influenced by both Eastern and Western cultures, much like the rest of the population. Their cultural identity is formed by a variety of factors that all work together to shape this effect, including the cultural capital of their families, their location of origin and upbringing, education level, social milieu, and socioeconomic standing (Avcı, 2015). Their opinions regarding cultural sub dimensions like power distance (great or small) and individuality vs collectivism are likewise greatly influenced by these factors.

*H2: CQ Knowledge has a positive significant impact on JS of university teachers*

***CQ Behaviour and Job Satisfaction***

The expectations, wants, behaviors, and work satisfaction views of teachers in their professional life are greatly impacted by the orientations shaped by cultural variables. If these culturally-shaped expectations and wants are not met, teachers may become less satisfied with their jobs, which may have an impact on how they feel about their jobs and possibly even cause them to consider leaving (Hardianto et al., 2019). As a result, the school could become a place where instructors are unhappy in their positions and intend to quit since their cultural expectations and desires have not been fulfilled. Consequently, the effectiveness of the organization is negatively impacted by this declining tendency. In order to avoid these negative consequences, educational establishments need principals who are highly culturally intelligent. Even fewer studies look at the relationship between teachers' intentions to quit and school principals' cultural intelligence, despite the paucity of research in the literature addressing the relationship between teachers' work satisfaction and cultural intelligence.

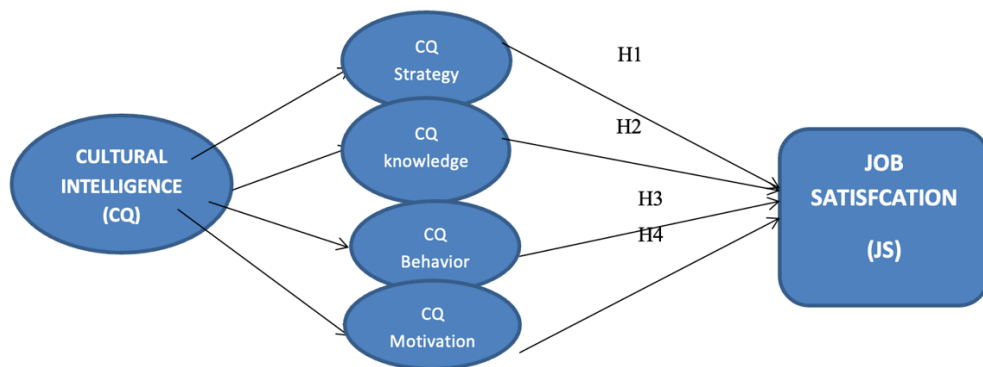
*H3: CQ Behaviour has a positive significant impact on Job Satisfaction of university teachers*

***CQ Motivation and Job Satisfaction***

Gokalp (2021), for example, carried out qualitative research with an emphasis on high school principals' cultural intelligence. The results showed that school principals with high levels of cultural intelligence had better employee well-being and job satisfaction, as well as a decrease in conflicts and employee burnout in the school setting. These factors were positively correlated with the intentions of the employees to leave the organization. Similarly, Licki and Van Der Walt (2021) found that teachers' job happiness and school principals' cultural intelligence level were positively correlated. They found that when school principals' levels of cultural intelligence rose, so did teachers' job satisfaction.

*H4: CQ Motivation has a positive significant impact on Job Satisfaction of university teachers*

## Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers



**Figure 1: Conceptual Model**

### Method

#### *Participants and setting*

250 academics from prestigious private Indian universities known for enrolling a sizable number of international students participated in the study. The first step in the participant selection procedure was gathering a pool of possible applicants from the websites of the universities. The educators at each university then got an email asking them to participate voluntarily in the study. 315 of the 400 instructors who were invited to participate did so. Data from 250 individuals were chosen for analysis after duplicate entries and incomplete surveys were eliminated.

#### *Measures*

The four facets of cultural intelligence that were investigated in this study were behavioral, cognitive, motivational, and metacognitive. To evaluate these dimensions, a set of 20 items drawn from scales created by Ang et al. (2007) was used. Agho, Price, and Mueller's (1992) Job Satisfaction Scale was used to measure university instructors' job satisfaction. A 5-point Likert scale was used to design each question, with 1 denoting "strongly disagree" and 5 denoting "strongly agree."

#### *Procedures*

An email invitation to take part in an online survey covering informed consent, demographics, cultural intelligence (CQ), and job satisfaction (JS) was issued to the chosen participants. Participants had access to the survey from late June 2023 through December 2023. Furthermore, university teachers who had not yet responded were sent reminder emails using a system based on Dillman's (2007) recommended approach.

#### *Research design and analysis*

Using a descriptive research design, the study investigated the influence of cultural intelligence on university professors' job satisfaction. The data was analyzed using partial least squares structural equation modeling (PLS-SEM). There were two main phases to the analysis, which was carried out with SmartPLS Version 4.0: assessing the measurement model and examining the structural model. Examining the measuring model's convergent and discriminant validity was a key component of the evaluation

process. While discriminant validity assessed how much an item differed from another across constructs, convergent validity gauged how related items were inside constructs.

## Findings

### *Measurement model assessment*

The assessment criteria used to evaluate the measurement model are listed in Table 1 and include factor loading, composite reliability (CR), and average extracted variance (AVE). A factor loading of 0.700 is generally regarded as the standard, while thresholds as low as 0.4, 0.5, and 0.6 might be appropriate in some situations (Ramayah et al., 2018). Notably, because of their noticeably low factor loadings, two items (CQB2 and CQM1) from the Cultural Intelligence scale were eliminated. 0.5 and 0.7 are the acknowledged criteria for AVE and CR, respectively. The results shown in Table 1 show that all of these criteria have been met, demonstrating the measurement model's acceptable convergent validity. Figure 2 shows the measurement model evaluation as represented by the SmartPLS output.

**Table 1 .Factor loading, composite reliability and average variance extracted**

	Item Code	Factor Loadings	Composite Reliability (CR)	Average Variance Extracted (AVE)
<b>Behavioral</b>	CQB1	0.767	0.861	0.607
	CQB3	0.809		
	CQB4	0.799		
	CQB5	0.741		
<b>Knowledge</b>	CQK1	0.71	0.882	0.556
	CQK2	0.678		
	CQK3	0.821		
	CQK4	0.806		
	CQK5	0.81		
	CQK6	0.631		
<b>Strategy</b>	CQS1	0.804	0.879	0.707
	CQS2	0.878		
	CQS3	0.839		
<b>Motivation</b>	CQM2	0.925	0.853	0.664
	CQM3	0.675		
	CQM4	0.825		
<b>Job Satisfaction</b>	JS1	0.607	0.886	0.611
	JS2	0.778		
	JS3	0.833		
	JS4	0.847		
	JS5	0.821		

## Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers

The heterotrait–monotrait correlation ratio (HTMT) was suggested by Henseler, Ringle, and Sarstedt (2015) as a benchmark for evaluating the measurement model's discriminant validity. Although Kline (2011) indicated that the criterion shouldn't surpass 0.85, Gold, Malhotra, and Segars (2001) recommended a threshold of 0.9. All of these requirements were satisfied, as shown by the results in Table 2, which supports the existence of discriminant validity in the measurement model.

**Table 2 .HTMT assessment of discriminant validity**

	<b>CQ- Behaviour</b>	<b>CQ- Strategy</b>	<b>CQ- Knowledge</b>	<b>CQ- Motivation</b>	<b>Job Satisfaction</b>
<b>CQ- Behaviour</b>					
<b>CQ- Strategy</b>	0.767				
<b>CQ-Knowledge</b>	0.861	0.855			
<b>CQ-Motivation</b>	0.168	0.117	0.168		
<b>Job Satisfaction</b>	0.596	0.666	0.682	0.086	

### ***Structural model assessment***

The Variance Inflation Factor (VIF) was used to assess if multicollinearity existed in the model. All VIF values were found to be comfortably below 3.3, indicating the lack of multicollinearity problems (Diamantopoulos & Siguaw, 2006). Bootstrapping was used to acquire the structural model analysis results that are shown in Table 3. When p-values were less than one of three thresholds  $p < 0.001$  ( $t > 1.645$ ),  $p < 0.05$  ( $t > 1.96$ ), or  $p < 0.001$  ( $t > 2.58$ ) the hypothesis was deemed supported. Every hypothesis was categorically supported by the results. Moreover, significance is defined by Cohen (1988) as an  $R^2$  value of at least 0.35; the computed  $R^2$  of 0.378 in this study satisfies this requirement, signifying significance.

To assess predictive significance, a blindfolding process with a distance omission of  $D = 7$  was used. The  $Q^2$  value computation, which makes use of a cross-validated redundancy technique, is in good agreement with the PLS-SEM analysis criteria (Hair, Thomas, Hult, Ringle, & Sarstedt, 2017). With a  $Q^2$  value of 0.351, the data indicates that all endogenous components show predictive relevance. The effect size of an endogenous variable indicates how much of an impact it has on an exogenous variable. Cohen (1988) defined a substantial influence as a  $f^2$  value of 0.35 or higher, a moderate effect as  $0.15 < f^2 \leq 0.349$ , and a slight effect as  $f^2 \leq 0.03$ . Table 3 presents the findings of the analysis, showing that each relationship has a slight to moderate effect size.

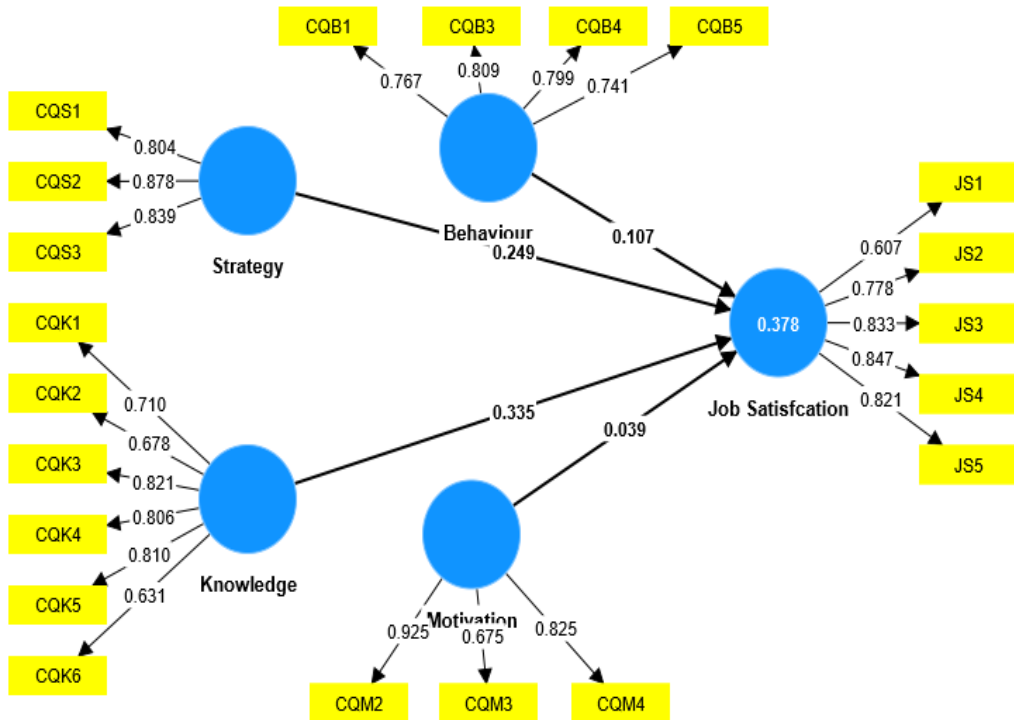


Figure 2. SmartPLS output of the measurement model.

Table 3. Results of path analysis, VIF,  $f^2$ ,  $R^2$  and  $Q^2$

Column1	Original sample (O)	Sample mean (M)	Standard deviation (STDEV)	T statistics ((O/STDEV))	P values	VIF	$f^2$	$R^2$	$Q^2$
Behavior -> Job Satisfaction	0.107	0.108	0.075	1.42	0.006	1.912	0.019	0.378	0.351
Knowledge -> Job Satisfaction	0.335	0.336	0.075	4.445	0.000	2.228	0.071		
Strategy-> Job Satisfaction	0.249	0.248	0.065	3.836	0.000	1.763	0.049		
Motivation -> Job Satisfaction	0.039	0.025	0.056	0.703	0.002	1.027	0.015		

## Discussion

The previous literature analysis in this study highlights the need for a deliberate effort to draw in and keep top-notch instructors who can adjust to the cultural dynamics common to colleges with a varied student body. It is critical to identify candidates who have the highest potential for success in our academic institutions and provide them with the necessary support to adjust to their new environments. The competition for teachers is growing, as evidenced by the increased efforts made in recruitment and retention

## **Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers**

(Magagna, 2006b; Hammen, 2005). This competition directly affects the caliber of educators and, in turn, the caliber of education provided to students (Guarino et al., 2006; ECS, 2005). This study has concluded that all the four dimensions of CQ have a positive significant impact on Job satisfaction of university teachers. This means that if teachers are culturally competent they will feel satisfied with their jobs and their tendency to quit job will be minimum.

Teachers with cultural intelligence are better equipped to negotiate and adjust to the cultural complexity found in a variety of university contexts. Having high levels of cultural intelligence gives instructors the information, abilities, and attitudes needed to recognize and value cultural differences as they engage with students from diverse backgrounds. Positive teacher-student connections are essential to job satisfaction, and they are fostered by the ability to adapt and relate to students from diverse cultural backgrounds (Parker, 2019). Teachers that possess cultural intelligence are better able to interact and work together with colleagues from different backgrounds. Effective cooperation and collaboration are crucial for establishing a positive work environment that promotes job satisfaction in colleges with a varied faculty (Thomas & Inkson, 2009). High cultural intelligence teachers can help to create a great work environment and increase job satisfaction by bridging cultural gaps, facilitating communication, and developing strong working connections with colleagues.

Teachers that possess cultural intelligence are better equipped to create culturally sensitive lesson plans that cater to the demands of a wide range of student demographics. Culturally sensitive instruction enhances students' involvement and academic performance by recognizing and appreciating their cultural backgrounds, experiences, and viewpoints (Gay, 2010). When educators see the positive results of their efforts in the learning outcomes of their students, they will feel more satisfied with their jobs. Teachers who exhibit cultural intelligence are better able to adapt instructional strategies, create inclusive learning environments, and incorporate diverse perspectives into their teaching. Working in multicultural university environments, cultural intelligence helps professors feel included and at home. Overall job happiness is influenced by feeling appreciated and respected for one's cultural identity (Sarstedt et al., 2019). Higher job satisfaction and retention are associated with teachers who possess high cultural intelligence since they are more likely to feel a feeling of belonging in their professional group.

When it comes to the job satisfaction of instructors who work at universities with students from a variety of cultural backgrounds, cultural intelligence is a critical factor. Cultural intelligence contributes to a healthy work environment and increases overall job satisfaction among educators by helping instructors navigate cultural difficulties, communicate effectively, establish culturally sensitive teaching approaches, and foster a sense of belonging. As a result, supporting instructors' growth in their cultural intelligence is crucial to fostering job satisfaction and, eventually, enhancing student learning in varied university environments. Teachers who invest in the development of their cultural intelligence skills report higher job satisfaction and improved teaching and learning outcomes in multicultural settings. Instructors possessing elevated degrees of cultural intelligence are more suitable to handle the varied educational requirements and inclinations of learners from disparate cultural contexts. Teachers can ensure inclusion and relevance in their curriculum and instructional practices by recognizing the cultural settings in which students learn. This will improve the educational outcomes for all students (Chen et al., 2019).

### **Conclusion**

The important connection between university instructors' job happiness and cultural intelligence (CQ) is clarified by the study's findings. By means of an extensive analysis of the four components of CQ behavioral, cognitive, motivational, and metacognitive it has been established that every component has a noteworthy positive impact on job satisfaction. It has been demonstrated that job satisfaction is positively impacted by the metacognitive feature of CQ, which entails knowing one's own cultural predispositions and learning processes. This implies that educators who are skilled at modifying their teaching strategies in light of their own cultural prejudices and who have a high level of self-awareness are likely to be happier in their roles.

Similar to this, the cognitive dimension of CQ which deals with knowledge and comprehension of various cultural practices and norms has emerged as a critical predictor of university instructors' job happiness. Teachers who have a thorough comprehension of other cultural backgrounds are more capable of creating inclusive learning environments, which in turn improves their own and their students' job satisfaction. It has been discovered that the motivational aspect of CQ which includes the desire and readiness to interact with people from different cultural backgrounds had a major influence on job satisfaction. Educators who exhibit a strong desire to establish a positive rapport with students and colleagues from varied cultural backgrounds are more likely to find fulfillment in their roles within the university environment.

One important factor influencing university instructors' job satisfaction is the behavioral dimension of CQ, which deals with how well one can adjust one's conduct in cross-cultural encounters. Teachers who are able to adjust and be flexible when managing cultural differences will be more successful in diverse learning contexts, which will increase their job satisfaction. These results have important ramifications since they indicate that university instructors' job happiness can be greatly increased by helping them develop their cultural competency. Because of this, educational establishments ought to give top priority to programs that help faculty members become more culturally intelligent. Through this approach, higher education institutions can establish more welcoming and encouraging work cultures that enhance teachers' job satisfaction and help retain outstanding faculty members within the academic community.

### **Practical Implications**

Educators possessing elevated cultural intelligence are more suitable to establish learning settings that are both inclusive and culturally sensitive. In order to suit the varied backgrounds and learning styles of their students, teachers might modify their pedagogy and classroom management techniques, which will increase student engagement and satisfaction. Teachers with diverse cultural origins can forge closer bonds with their students when they possess cultural intelligence. Teachers can build rapport and trust with their student's two critical components of effective teaching and learning by exhibiting an awareness of and respect for their cultural identities. To improve instructors' cultural intelligence, educational institutions might offer opportunities for professional growth and training. Institutions can enhance teacher satisfaction by equipping educators with the necessary knowledge and abilities to manage various classroom environments and facilitate students' success through investments in their cultural competence. Teachers with cultural intelligence are better able to manage the difficulties and complexities of teaching in multicultural settings. By proactively addressing cultural differences and fostering

## **Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers**

inclusivity, they can reduce possible sources of stress and burnout, which will increase teachers' job satisfaction and well-being.

### **Limitations and future work**

There are several restrictions on our investigation. First of all, it may be deemed unsuitable to test a causal hypothesis with cross-sectional data. Cross-sectional data, however, has been employed in recent research to examine causal correlations (Naqshbandi, Singh, & Ma, 2016). Subsequent studies could if you want to examine the causal linkages covered in this paper, think about utilizing longitudinal data. Second, the only outcome variable taken into account in our research is job satisfaction. Future studies may take into account additional relevant outcomes of such as employee job performance, work engagement, weariness, and turnover intention, even though this may not always be a constraint.

### **Authors' Contributions:**

The authors contributed equally to this work.

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## Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers

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### Article Info

*Received:* May 06 2025

*Accepted:* May 25 2025

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#### How to cite this article:

Ashraf, A., Andrabi, U., Popescu, V., Birau, R. (2025). Addressing Cultural Disparities in the Classroom: Evaluating the impact of Cultural Intelligence on Job Satisfaction of teachers. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 242 – 257.



## ORIGINAL PAPER

# How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities

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### Abstract:

This paper explores the profound impact of artificial intelligence (AI) on the financial-banking sector, emphasizing how digitalization and AI are reshaping operational rules and customer interactions. The analysis focuses on the transition from traditional transactions to the extensive use of virtual currencies and the digitization of financial securities, highlighting how emerging technologies, such as open banking and modular architectures, contribute to creating a more integrated and accessible financial landscape. The study underscores AI's ability to optimize financial decision-making processes, from risk management to personalizing customer offerings, and stresses the importance of adapting the regulatory framework to protect consumers and promote responsible innovation. Through this analysis, the paper provides valuable insights into current and future developments in the financial-banking sector, marking a crucial stage in understanding technology's impact on finance.

**Keywords:** *Digital Transformation, Predictive Algorithms, Financial Intermediation, Open Banking, Financial Sustainability.*

**JEL Classification:** G21, O32, E58.

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# **How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities**

## **1. Introduction**

The financial services sector has been profoundly reshaped not only by technological advances and changes in consumer behavior but also by the emergence and integration of artificial intelligence (AI) into its fundamental processes and services. This dual shift towards digitalization and AI has driven a profound transformation in the banking and financial sectors, driving institutions to reconsider traditional business models and innovate in customer interactions. Initially, digitalization facilitated the development of advanced techniques for managing transactions and customer relationships, while AI has deepened this transformation by optimizing financial decision-making, personalizing services, and improving risk management.

Advances in cryptocurrencies and the prospect of introducing central bank digital currencies (CBDCs) have further intensified this shift toward a predominantly digital financial system, where the internet has become an essential catalyst for innovative transactions. This shift towards digitalization and AI is reshaping both financial infrastructure and the fundamental paradigms of trust and security, suggesting that although money is becoming increasingly virtual, it remains anchored in the reality of advanced technological systems and specialized expertise.

Digitalization has also paved the way for significant diversification and expansion of the capital market by reducing entry barriers and increasing operational efficiency. In this context, AI plays a crucial role in creating electronic trading systems that optimize liquidity flows and strengthen financial markets, accelerating the trend of continuous change and innovation.

Thus, the intersection between digitalization and artificial intelligence is redefining not only the structure and functioning of the financial sector but also how financial institutions adapt to the ever-changing needs of customers. This new landscape, marked by dematerialized transactions and electronic signatures, not only amplifies the digitalization of financial banking activities but also opens a vast horizon of possibilities for innovation, efficiency, and unprecedented levels of personalization.

## **2. Literature review**

Digital transformation and artificial intelligence (AI) mark a new era in the banking and financial sector, fundamentally reshaping how financial institutions operate and interact with customers. This section combines a detailed analysis of digitalization's impact, including the emergence of central bank digital currencies (CBDCs), and artificial intelligence, considering associated challenges and opportunities, as well as implications for security, regulation, and product and service innovation.

Digitalization in the financial sector, through the introduction of CBDCs, promises to enhance payment system efficiency and promote financial inclusion. These digital currencies, backed by central banks' credibility, offer a secure and accessible alternative to traditional payment methods, facilitating faster transactions and reducing associated costs (Spulbar & Spulbar, 2022; Auer & Böhme, 2020). The importance of blockchain and Distributed Ledger Technology (DLT) in supporting CBDCs is undeniable, ensuring security, transparency, and efficiency-essential for the credibility and integrity of digital currencies (Spulbar & Mitrache, 2023).

At the same time, AI adoption is transforming financial operations, enabling banks to analyze real-time data, personalize customer services, and optimize risk management. AI applications, from robo-advisory services to fraud detection systems,

illustrate technology's potential to bring significant innovations to the industry, improving customer experience and operational efficiency (Buchanan, 2021).

Despite these advantages, the implementation of digitalization and AI in the banking and financial sector raises numerous challenges. Concerns related to data security, cybersecurity risks, and the impact on the workforce require cautious approaches and appropriate regulations to ensure fairness, transparency, and consumer protection. Additionally, collaboration between financial institutions, regulators, and stakeholders is crucial for navigating the evolving technological landscape and maximizing technological benefits while ensuring global financial system stability (Philippon, 2019).

Emerging technologies like AI and blockchain are reshaping the future of the financial sector, bringing significant improvements in the efficiency, security, and accessibility of financial services. AI's ability to revolutionize risk management and compliance in financial institutions is significant, contributing to enhanced accuracy and efficiency in fraud detection and monitoring of suspicious transactions. Machine learning algorithms allow banks to identify patterns and anomalies in data, offering a superior level of financial security and fraud protection. This advanced analytical capability highlights the necessity of an adaptable regulatory framework that keeps up with technological innovations (Arner, Barberis, & Buckley, 2016).

Concurrently, blockchain is redefining transparency and efficiency in payment systems, offering new perspectives on reducing verification costs and transaction trust. According to Catalini and Gans (2016), blockchain facilitates greater efficiency and reduces payment processing time, paving the way for developing new decentralized financial business models. However, implementing this technology involves challenges related to scalability, energy consumption, and interoperability, requiring innovative solutions and collaboration among industry players.

Thus, the literature highlights a continuously evolving financial landscape where technological innovations play a fundamental role in the evolution of financial services. These technologies not only promise to enhance financial operations' efficiency but also bring complex challenges, emphasizing the importance of adaptation and collaboration in the sector to maximize potential benefits

### **3. The Impact of digitalization and Artificial Intelligence**

In my academic endeavor to map the profound transformation of the financial sector under the auspices of digitalization and advances in artificial intelligence (AI), I have identified a significant inflection point that reconfigures the traditional and operational architecture of the industry. This inflection point, marked by the implementation of emerging technologies, does not merely optimize pre-existing processes but also initiates the emergence of new paradigms of innovation, business models, and financial service spectra adapted to the needs and expectations of the 21st century.

My analysis has focused particularly on the revolutionary impact of artificial intelligence in risk management and data analysis, areas where AI has demonstrated remarkable potential in transforming how financial institutions address challenges and opportunities. A key example of this is the use of machine learning algorithms to enhance fraud detection systems. This technology enables the highly accurate identification of suspicious transactions, significantly surpassing the limitations of traditional methods. Such advanced systems not only enhance the financial security of institutions and their clients but also significantly improve compliance processes, dynamically adjusting to

## **How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities**

legislative changes without incurring additional operational costs. The importance of this aspect is accentuated in the context of a continuously evolving global financial landscape, where the ability to respond swiftly and efficiently to new legislative and operational challenges becomes crucial.

On the other hand, digitalization, and particularly the introduction of central bank digital currencies (CBDCs), has generated considerable academic and practical interest. The analysis of pilot initiatives implemented by central banks in various jurisdictions has revealed the significant potential of CBDCs to positively influence the efficiency of payment systems and promote financial inclusion. By reducing transaction-related costs and offering increased accessibility to financial services, CBDCs have the potential to address some of the most pressing challenges of financial exclusion. Their contribution to sustainable development goals is particularly relevant in the current global context, highlighting the role of financial technology in facilitating access to financial services for unbanked populations and supporting inclusive economic growth.

Therefore, the impact of digitalization and artificial intelligence on the financial-banking sector transcends the mere optimization of existing processes, opening new horizons for innovation in banking services, improving access to these services, and strengthening banking security and integrity. The crucial role of these technologies in shaping the future of the financial sector is indisputable, requiring a profound understanding and strategic approach to maximize benefits and minimize associated potential risks.

Based on these observations, I have compiled a conceptual table summarizing the main benefits of AI and digitalization in the financial-banking sector:

<b>Technology</b>	<b>Impact on the Financial-Banking Sector</b>	<b>Examples</b>	<b>Specific benefits</b>
Artificial Intelligence	Optimization of decision-making processes	Algorithms for credit assessment	Faster and more accurate decisions, reduction of human errors
	Improving security	AI-based fraud detection systems	Minimizing fraud-related losses and strengthening customer trust
	Personalization of customer experience	Chatbots for customer service	Enhanced customer satisfaction, increased operational efficiency
Digitalization (CBDCs)	Payment efficiency	Pilot projects for central bank digital currencies	Lower transaction costs, improved access to financial services
	Promoting financial inclusion	Accessible CBDCs for unbanked populations	Expansion of access to financial services, reduction of financial exclusion
	Stimulating financial product innovation	Payment platforms based on CBDCs	Creation of new market opportunities, development of the digital economy

Digitalization (Internet Banking)	Enhanced accessibility and convenience	Mobile banking applications	Remote financial management, 24/7 account access
	Reduction of operational costs	Migration of banking services online	Lower physical infrastructure costs, increased efficiency
	Improved personal financial management	Online budgeting and investment tools	Enhanced financial education, informed financial decisions
Digitalization (Banking Products and Services)	Portfolio diversification	Online investment platforms	Financial products tailored to modern needs, increased flexibility
	Innovation in financial product offerings	Online savings accounts with benefits	Competitive financial services, attraction of new clients
	Increased transparency in financial offerings	Online banking product comparison tools	Accessible product information, better consumer choices
Risk Management Technologies	Improved risk and assessment management	Predictive analytics based on big data	Early risk identification, personalized mitigation strategies
	Effective compliance	Automated regulatory reporting platforms	Lower compliance costs, rapid adaptation to new regulations
	Optimization of due diligence processes	Automated customer verification systems	Faster onboarding processes, reduced fraud risks

*Source: processing after Publication CAFR Articol 9718 (2020)*

#### **4. Challenges and risks**

One of the main concerns regarding the integration of artificial intelligence in the financial sector relates to ethical risks and data privacy. These technologies, while capable of personalizing services and improving efficiency, raise important questions: How do we ensure that AI use respects fundamental client rights and does not conflict with privacy principles? Recent studies highlight the necessity of implementing robust regulatory and ethical frameworks that govern data usage and ensure algorithm transparency (Bostrom & Yudkowsky, 2014).

Another challenge is the potential bias and discrimination in automated decisions made by AI systems, which could perpetuate existing inequalities or introduce new forms of discrimination. This risk requires special attention in the development and training of algorithms to ensure fairness and impartiality in financial services (Mittelstadt et al., 2016).

The extensive digitalization of the financial sector, including the rise of internet banking, the proliferation of digital financial products and services, and the expansion of online platforms, brings significant cybersecurity challenges. A crucial question in this context is: How can financial institutions effectively protect themselves against growing cyber threats while offering secure and accessible digital services? The literature indicates the necessity of continuous investments in advanced security technologies and staff training to address these risks (McKinsey & Company, 2017).

## **How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities**

Additionally, the extensive digitalization of the financial sector raises concerns about digital exclusion. As financial services become increasingly digital, how do we ensure that they remain accessible to all clients, including those without access to digital technology or the necessary competencies to use it? This is a crucial challenge for promoting authentic and sustainable financial inclusion (World Bank Group, 2018).

### **5. Opportunities and Future Perspectives**

Exploring opportunities and future perspectives in the context of digitalization and artificial intelligence in the financial sector reveals a landscape full of potential for innovation, growth, and sustainable development. These emerging technologies not only pave the way for significant operational efficiencies and improved customer experience but also offer unique opportunities to address long-standing structural issues within the global financial system.

Artificial intelligence (AI) is emerging as a key catalyst for transformation and innovation in the financial sector. With its ability to process and analyze massive volumes of data in a remarkably short time, AI enables an unprecedented level of personalization of financial services. This evolution raises a fundamental question: To what extent can AI transform interactions between financial institutions and their customers, offering services that address not only explicit needs but also latent consumer demands? The answer lies in the development and implementation of machine learning algorithms that, by analyzing customer behavior and financial history, can recommend products and services precisely tailored to each client's individual needs. This approach not only enhances customer satisfaction and loyalty but also optimizes financial service offerings.

Beyond service personalization, AI plays a crucial role in democratizing access to financial advisory services through robo-advisors. These automated advisors represent a revolution in providing investment and financial planning services, making them accessible to a broader audience, regardless of portfolio size or prior financial knowledge. The impact of robo-advisors on the financial market suggests a significant potential for market expansion and diversification, attracting new customer segments and promoting a culture of prudent and informed investment.

Digitalization represents another driving force in the transformation of the financial sector, fundamentally reshaping how financial services are accessed and offered. Internet banking, mobile banking applications, and online financial trading platforms have revolutionized customer experience, allowing them to access banking and investment services from anywhere, at any time. However, this omnipresence of digital financial services raises important questions regarding security and data privacy: How can financial institutions balance increased accessibility with the protection of customers' personal data in this new digital landscape?

The digitalization of banking products and services expands the portfolio of available offerings, introducing innovative financial solutions such as digital wallets, instant payments, and open banking services. This evolution not only meets the changing demands of modern consumers but also stimulates competition within the financial sector, encouraging institutions to innovate and develop more efficient and accessible financial solutions.

As the world faces challenges related to climate change and sustainability, the financial-banking sector has a unique opportunity to contribute to solutions by focusing on green finance and sustainable investments. The use of digital technologies and AI to

assess climate risks in investment portfolios and to finance projects supporting the transition to a green economy represents a paradigm shift. This direction not only aligns the financial sector with global sustainable development goals but also opens new markets and investment opportunities in clean technologies and renewable energies, redefining finance's role in promoting a sustainable future.

## **6. Case Study on Customer Digitalization**

Over the past decade, the banking sector has undergone a radical transformation, driven by significant technological advancements and changing consumer behavior. This case study aims to explore the dynamics of adopting digital technologies and artificial intelligence within the Romanian financial banking system, with a particular focus on the use of mobile banking services. By conducting a comparative analysis of five major banks in Romania, each with distinct ownership structures and strategic visions, this study seeks to identify the factors contributing to variations in mobile banking adoption rates among these institutions. In an era where digitalization is no longer an option but a necessity, understanding these dynamics becomes essential for shaping future banking strategies and ensuring a smooth transition toward an integrated digital financial landscape. This introduction lays the foundation for an in-depth analysis that aims not only to highlight current trends in banking digitalization but also to anticipate future development directions in the context of a continuously evolving financial sector.

Bank	Ownership	Total Customers	Mobile Banking Users	Mobile Banking Adoption Rate
<b>ING Bank</b>	<b>Dutch</b>	<b>1,6 million</b>	<b>1,14 million</b>	<b>71,5%</b>
<b>Banca Transilvania</b>	<b>Romanian</b>	<b>2,99 million</b>	<b>1,75 million</b>	<b>58,5%</b>
<b>BCR Esrte Group</b>	<b>Austrian</b>	<b>2,9 million</b>	<b>1,75 million</b>	<b>60%</b>
<b>Raiffeisen Bank</b>	<b>Austrian</b>	<b>2,1 million</b>	<b>800.000</b>	<b>38%</b>
<b>BRD Group Societe General</b>	<b>French</b>	<b>2,2 million</b>	<b>624.000</b>	<b>28,3%</b>

*Source: FinZoom.ro. (2022)*

From the data presented, it is evident that ING Bank stands out with the highest mobile banking adoption rate, with 71.5% of its customers using this service. This impressive performance aligns with the bank's vision of a "Digital Destiny," indicating a strong commitment to innovation and digitalization. ING Bank's emphasis on innovative digital solutions and a seamless, intuitive user experience is a key factor explaining this penetration rate.

Banca Transilvania and BCR also exhibit solid mobile banking adoption rates, at 58.5% and 60%, respectively. These figures highlight both banks' efforts to improve customer access to digital banking services and promote a digital culture among their clients. Banca Transilvania's vision of providing added value to customers and shareholders, along with BCR's commitment to supporting community development

## **How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities**

through financial intermediation, reflects a deep understanding of customer needs and the role of technology in meeting them.

Raiffeisen Bank and BRD, on the other hand, display the lowest adoption rates, with 38% and 28.3%, respectively. Although both banks aim to be the preferred financial ecosystem, the figures indicate challenges in attracting customers to their mobile banking platforms. These lower adoption rates can be attributed to various factors, including the effectiveness of customer awareness and digital education campaigns, as well as the user experience offered by their digital platforms.

The adoption of mobile banking in Romania is influenced by multiple factors, including the strategic vision of banks, investments in technology, and the ability to educate and attract customers to digital services. ING Bank exemplifies the success of a well-directed digitalization strategy, while the lower figures for Raiffeisen Bank and BRD highlight the need for enhanced efforts in this direction. It is essential for banks to continue innovating and investing in technology while maintaining a strong focus on the diverse needs and expectations of their customers to ensure an equitable and inclusive transition to digitalization.

### **7. Cyber risk assessment in the banking system**

Essentially, cybercrime can be classified into two main categories: the first category includes offenses that directly target and impact digital infrastructures, such as malware attacks, viral infections, or denial-of-service (DoS) attacks. The second category encompasses crimes facilitated by the digital environment, although their objectives transcend the technological framework, exemplified by fraud, identity theft, phishing scams, cyber conflicts, or online harassment. This distinction reflects the diversity and complexity of cybercrime, according to statements from the CEO of Cyberlaws.net and a cybersecurity consultant.

#### *1. Malware și ransomware*

Every 14 seconds, someone can fall victim to a cyberattack, as ransomware has already caused damages amounting to \$11.5 billion in 2019. If a computer or system utilizing malware or malicious software is compromised, the victim is often required to pay a ransom to regain access. It is estimated that such attacks cost victims billions of dollars annually, as hackers employ sophisticated technologies to hijack an organization's database and seize all critical information for ransom.

#### *2. Phishing attack*

Phishing is widely recognized as an accessible and low-effort method to harm a target. It typically involves the distribution of malware through seemingly legitimate emails from reputable sources, granting hackers unauthorized access to victims' systems. With the expansion of services such as Dropbox, Office 365, Salesforce, and others, hackers are continuously enhancing their capabilities with increasingly sophisticated attack strategies.

#### *3. Supply chain & Third-party attacks*

A supply chain attack (also known as a third-party attack) occurs when a system gains unauthorized access to other systems through an external source. The rise of digital supply chains has created new opportunities for hackers, making these attacks increasingly prevalent. Key security concerns when working with third-party entities include software patches and updates. Many third-party applications rely on external libraries and sources

for updates. When these external resources are hacked, system updates are redirected to malicious servers, which then spread the infection to their victims.

4. *Endpoint attacks*

As more companies adopt cloud computing for data storage, the attack surface continues to expand. Hacking vectors have increased due to the culture of device compatibility, as SaaS providers for data services continue to grow.

5. *Man-in-the-middle attack*

In this type of attack, a malicious actor intercepts communication between two parties, collecting sensitive information and using it to impersonate one of the participants in order to deceive consumers.

6. *(DoS) Denial of Service attack*

This type of attack is executed against a network user's computer to render it inaccessible to others. The attacker overwhelms the target system with excessive traffic or requests, ultimately disrupting its functionality and causing significant operational damage.

Security scanners, Intrusion Prevention Systems (IPS), Intrusion Detection Systems (IDS), network firewalls, and security applications are some of the advanced technologies used in cybersecurity. Since most hackers exploit port 80 or 443 (SSL) for commercial transactions, many security solutions and technologies are unable to protect against application-level threats. Internal security within organizations is ensured through network firewalls, which remain vulnerable to various forms of cybercriminal attacks. The following recommendations summarize available security options along with their associated limitations.

1. *Vulnerability scanners*

Web application scanners are automated tools that systematically crawl through a web application and scan its web pages for application vulnerabilities. These scanners generate probe inputs and then analyze responses to identify potential security weaknesses.

2. *Intrusion Prevention Systems (IPS)*

Most IPS solutions operate automatically based on predefined policies set by administrators, designed to detect and prevent unauthorized access to a company's resources or infrastructure.

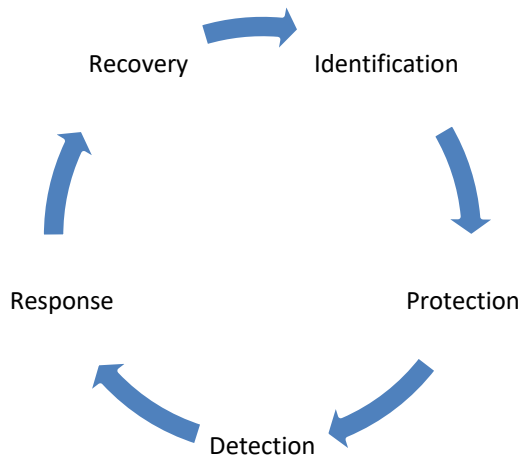
3. *Intrusion Detection Systems (IDS)*

An Intrusion Detection System (IDS) is a hardware or software program that monitors hostile activities or policy violations within a network. A Security Information and Event Management (SIEM) system is often used to report or collect data on any harmful activity or breach. Some IDS solutions have the capability to respond to intrusions as soon as they are detected. Intrusion Prevention Systems (IPS) are designed to proactively block such threats.

4. *Cybersecurity risk management framework*

A common starting point for countries with specific regulatory requirements for cyber risk is the establishment of a documented cybersecurity policy or program within banks. These regulatory criteria are typically structured around key risk management categories, including governance, identification, protection, detection, response, and recovery, as illustrated in the figure below:

## How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities



*Source: Emerging Cyber Security Framework (2019)*

- **Identification:** Within the meticulous identification process, it is imperative to develop a comprehensive profile that encompasses the reference-situation-threat spectrum, the risk exponent, and a detailed assessment of potential losses. This stage requires an in-depth and systematic analysis, grounded in precise data collection and interpretation, to establish an effective framework for preventing and mitigating cyber risks.

- **Protection:** The paradigm "It is wiser to prevent than to remedy" is of utmost importance in the field of cybersecurity. The optimal strategy involves implementing proactive measures to prevent cyber incidents before they occur. Installing high-quality security software on IT infrastructures is essential, as it serves as a robust barrier against potential attacks.

- **Detection:** Assessing an application's security capabilities is a fundamental pillar in the early detection of vulnerabilities and security weaknesses. Through regular and meticulous scans, the goal is to identify and promptly remediate any security breaches. Penetration testing, in particular, plays a crucial role in determining the vulnerability level of networks and physical infrastructures, providing a realistic perspective on system resilience.

- **Response:** Developing an incident management protocol is essential for analyzing and mitigating risks associated with IT systems or approved security policies. This process involves establishing a coordinated and efficient response mechanism that enables institutions to address and resolve security incidents in a structured manner, minimizing their impact on operations.

- **Recovery:** Developing recovery measures is essential for restoring functionality and business continuity following cyber incidents. This includes creating business connectivity plans at a continental level, disaster recovery plans, and internal data recovery systems. These strategies must be well-integrated to ensure a smooth transition back to normal operations, protecting the organization's critical resources and maintaining operational continuity under maximum security conditions.

Cyberattacks have also targeted central banking institutions in New Zealand and Pakistan. Incidents involving the European Central Bank have manifested through data integrity breaches (as seen in the United States and Italy) or disruptions to commercial activities (such as in Russia and Azerbaijan). However, in the United States, a significant proportion of these intrusions had a fraudulent nature, resulting in financial losses estimated at \$117 million, as presented in Table 1.

*Table 1: Cyberattacks on global central banks*

Institution	Year of attack	Attack Type	Details
Reserve Bank of New Zealand	2021	Data breach	The actors gained unauthorized access to the bank's data using one of its third-party file-sharing services.
South African Bank	2020	Data breach	A person posing as a credit officer sold the personal information of 200,000 customers to third-parties.
Hungarian Banks	2020	DDoS	A large DDoS attack carried out from computer servers in Russia, China, and Vietnam disrupted service.
CIH Bank	2020	Theft	Hacking into customer accounts resulting in unauthorized transactions.
SberBank of Russia	2019	Data breach	60 million customer credit card details leaked.
Bank Islami in Pakistan	2018	Data breach	A cyber attack on the international payment network was detected, causing a system shutdown and losses of Rs 2.6 million.
Bank of Italy	2017	Fraud	Hacking of former CEOs' email accounts

## How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities

<b>Bank of Russia</b>	<b>2016</b>	<b>Fraud</b>	The bank suffered a loss of \$22 million from 21 cyberattacks and \$50 million from correspondent banks.
<b>Central Bank of Azerbaijan</b>	<b>2015</b>	<b>Data breach</b>	Theft of thousands of bank customer information
<b>ECB</b>	<b>2014</b>	<b>Data breach</b>	20,000 email addresses and contact information compromised.
<b>Banco Central del Ecuador</b>	<b>2013</b>	<b>Fraud</b>	The city of Riobamba's account at the national bank was robbed of US\$13.3 million.

*Source: News & Carnegie Endowment for International Peace (2022)*

Cyberattacks are more likely to include fraud and data breaches, but they can also cause significant business disruption. Fraud accounts for 43% of events recorded in the ORX News dataset, followed by data breaches (34%) and outages (23%). While a business disruption is immediately apparent, other forms of cyberattacks may take months or years to be discovered and reported, resulting in a bias in the dataset.

As recently demonstrated by a robbery involving the SWIFT system, cyberattacks can be used for fraudulent purposes (Table 2). Cybercriminals can gain access to personal information, such as customers' online payment details. Cyber-related fraud accounted for 90% of the losses reported in the sample.

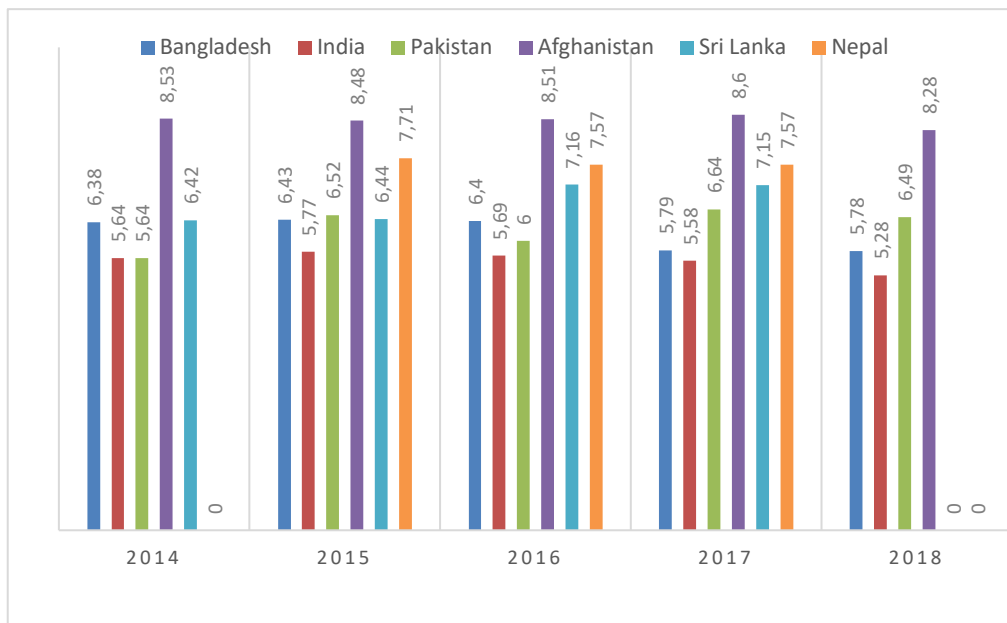
*Table 2: Cases of cyber attacks via SWIFT Network*

<b>Institution</b>	<b>Date of attack</b>	<b>Initial loss (million dollars)</b>	<b>Current Estimated Loss (million dollars)</b>
<b>Union Bank of India</b>	February, 2015	<b>12.2</b>	<b>9.4</b>
<b>TP Bank (Vietnam)</b>	May, 2016	<b>1</b>	<b>0</b>
<b>Bangladesh Central Bank</b>	February, 2018	<b>171</b>	<b>0</b>
<b>Akbank (Turkey)</b>	December, 2016	<b>4</b>	<b>4</b>
<b>Globex (Russia)</b>	December, 2016	<b>1</b>	<b>0.1</b>
<b>NIC Ais Bank (Nepal)</b>	October 2017	<b>4.4</b>	<b>0.6</b>

<b>City Union Bank (India)</b>	January 2018	<b>2</b>	<b>-</b>
<b>Far Easter International Bank</b>	October 2017	<b>60</b>	<b>0.5</b>
<b>Banco del Austro(Ecuador)</b>	January 2015	<b>12.1</b>	<b>9.4</b>

*Source: ORX News, Financial Times. (2021)*

The Basel AML Index reveals that the overall risk score is determined as a weighted average of 14 indicators related to regulations, AML/CFT operations, financial standards, political disclosure, and the rule of law. Data sources used by the Basel Institute include the Financial Action Task Force (FATF), Transparency International, the World Bank, and the World Economic Forum. Rather than analyzing currency volume or illegal exchanges, the index illustrates a country's vulnerability in this way.



*Source: Cost of Cybercrime Study in Financial Services Report (2019)*

The figure above shows that Bangladesh ranks fifth on the AML list among six South Asian countries, surpassing India over the past five years. The 2018 Basel AML Index was based on a study of 129 countries identified as high-risk for money laundering and terrorist financing. In 2018, Bangladesh was ranked with a score of 5.78 (51st place), while India had the same score of 5.78 but was ranked 68th. Since its inclusion in the Basel AML records, Afghanistan has held the highest risk score. On the other hand, India has the lowest risk score.

## **How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities**

consistently recorded the lowest risk score among the six mentioned countries over the past five years. Compared to 2016, Bangladesh's score steadily declined in both 2017 and 2018. Ultimately, all companies should implement a cyber risk control policy, as projected for 2023 in the table above.

### **8. Cybersecurity Challenges in the Financial-Banking Sector**

Cybersecurity in the financial sector faces increasingly complex challenges, highlighted by the alarming 600% increase in cyberattacks over the past four years, according to Bogdan Patru, Director of Government Engagement at Mastercard, during a specialized forum organized by Financial Intelligence. This alarming situation, with estimated financial damages of \$6 trillion in 2022, places the financial sector at the center of cybercriminals' targets, a concerning reality for financial institutions and service users alike.

The digital transformation, accelerated by the pandemic, has fundamentally changed the way we interact and conduct financial transactions. Platforms such as Ghiseul.ro, which has doubled its user base annually, and the expansion of e-commerce reflect this transition towards a virtual space where mobile devices have become essential tools. This shift in consumer behavior enriches the digital ecosystem with vast amounts of data and financial resources, inevitably attracting the attention of malicious actors.

Technological innovation, driven by advancements in artificial intelligence, machine learning, and quantum computing, provides valuable tools for fraud detection and prevention. These technologies can identify fraudulent behaviors before they cause harm through an effective early warning process. However, as security mechanisms become more advanced, cybercriminals also refine their methods, employing techniques such as deepfake manipulation to deceive and exploit victims.

Current legislation struggles to keep up with the rapid evolution of technological innovation. While Romania ranks relatively well compared to other EU member states in terms of regulatory implementation speed and technological adoption, it is clear that no legislative framework can be entirely foolproof in cybersecurity. This underscores the importance of public education and awareness of cybersecurity, a collective responsibility that extends beyond institutional boundaries.

Regarding financial fraud, data from the National Bank of Romania indicates a declining trend in such incidents, with most initially reported fraud cases ultimately being identified as unintentional or mistaken uses of financial instruments. This once again highlights the crucial role of the human factor in the fight against fraud and cyberattacks, emphasizing the need for increased attention to digital security education and awareness.

Awareness efforts and collaboration between the public and private sectors, exemplified through information campaigns and the active exchange of best practices, are essential strategies for strengthening cybersecurity. Initiatives such as those of the Romanian Banking Association, which promotes online security in partnership with state authorities, serve as positive examples of such collaboration.

Thus, in the face of an exponential increase in cyberattacks and a continuously evolving technological landscape, the financial sector must balance innovation with the implementation of robust security measures and the promotion of a cybersecurity culture among its users. This multidimensional approach is essential for successfully navigating current challenges and ensuring a secure financial environment that fosters trust in the technology shaping the future of financial services.

## 9. Conclusions

The general conclusion regarding the impact of digital technologies and artificial intelligence (AI) within the financial banking system reveals a dynamic and profoundly transformative landscape, offering both significant opportunities for economic growth and essential challenges to the traditional model of human interaction in financial services.

Technological advancements, particularly the proliferation of AI and the expansion of digitization, provide financial institutions with unprecedented tools to optimize processes, enhance operational efficiency, and personalize the services offered to clients. From advanced machine learning algorithms that facilitate real-time fraud detection and prevention, to internet and mobile banking platforms that enable unrestricted access to financial services, technology has fundamentally reshaped the ways in which financial services are designed, offered, and consumed. In this context, it is estimated that the adoption of emerging technologies could generate significant financial growth for the banking and financial sector, contributing to global economic expansion over the next 5-10 years.

However, despite technological progress and its economic potential, it remains essential to acknowledge that society is not yet ready to rely exclusively on digital interactions, especially in such a sensitive and personal field as finance. While digitization facilitates access to financial services for a wide range of clients, it does not equally reach all age groups and demographics. In particular, individuals from older segments or with limited access to technology may often find themselves marginalized by the rapid digital transition. This highlights the importance of maintaining a balance between innovation and human accessibility in providing financial services.

Consequently, maintaining bank branches and face-to-face interactions remains crucial in the next 5-10 years, not only as a means of ensuring financial inclusion for all population segments but also to preserve the human element of interaction, which is often essential in building trust and understanding between clients and financial institutions. It is imperative that, in the journey towards digitalization and automation, the financial sector does not underestimate the value of human relationships and ensures that technological progress goes hand in hand with ethical principles, sustainability, and social equity.

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## How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities

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### Article Info

*Received:* March 24 2025

*Accepted:* May 20 2025

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#### How to cite this article:

Smarandescu, A. (2025). How Artificial Intelligence is Rewriting the Rules of the Game in the Financial Banking Industry. Opportunities, Perspectives, and Challenges for the Future of Banking Activities. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 258 – 273.



## ORIGINAL PAPER

# How humans and AI can thrive together in the workplace?

Lucian-Florin Spulbar<sup>1)</sup>, Lavinia-Adelina Mitrache<sup>2)</sup>

### Abstract:

The use of Artificial Intelligence (AI) in the global workforce has prompted a controversy about whether it will affect human jobs. As much as people are afraid of losing their jobs, another school of thought indicates that AI and human labor can work together to boost productivity, creativity, and efficiency. This paper explores how AI has the potential to help humans get their job done more effectively, not to substitute for them. It calls for adapting the human capital, launching training programs, and redesigning job tasks. Based on research from multidisciplinary fields, this study discusses examples of successful partnerships of AI and humans in different sectors, such as healthcare, finance, and manufacturing.

Besides, this paper critically analyzes the ethical, economic, and social implications of AI diffusion in the labor market, with reference to issues of algorithmic bias, job polarization, and the dynamic nature of labor demand. The argument emphasizes the need for policymakers, educators, and business leaders to develop an AI-congruent workforce through inclusive policies and continuous learning mechanisms. Rather than viewing AI as an existential threat to employment, this study argues that leveraging AI in a beneficial manner by augmenting human creativity, emotional intelligence, and problem-solving capabilities with machine productivity can build a more resilient and flexible labor market. This research reimagines the place of AI in work. It advocates for a future in which humans and AI coexist and work harmoniously together, contributing to economic and technological growth in a rapidly evolving digital age.

**Keywords:** *Artificial Intelligence (AI), human-AI collaboration, job automation and workforce adaptation, AI ethics, future of work and technology.*

**JEL Classification:** J24, O33, M15

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# **How humans and AI can thrive together in the workplace?**

## **1. Introduction**

The rapid advancement of Artificial Intelligence (AI) has transformed the global workforce, sparking intense debates about its implications for human employment. While some fear that AI will replace human jobs, others argue that it has the potential to complement and enhance human labor, fostering increased productivity, efficiency, and innovation. AI-driven technologies, such as machine learning, natural language processing, and robotics, are being integrated into diverse industries, reshaping the way work is performed. From automating repetitive tasks to assisting in complex decision-making, AI is proving to be a powerful tool that, when used effectively, can improve workplace outcomes rather than diminish human roles.

Historically, technological advancements have disrupted labor markets but also led to the creation of new jobs and industries. The industrial revolution replaced many manual tasks, yet it also generated opportunities for workers in new sectors. Similarly, AI is changing job structures, requiring workers to adapt to new roles that demand collaboration with intelligent systems. Rather than eliminating the need for human expertise, AI augments human capabilities by handling large-scale data processing, recognizing patterns, and executing routine functions with speed and accuracy. This shift allows employees to focus on creative problem-solving, strategic thinking, and interpersonal tasks that AI cannot replicate.

However, the integration of AI into the workplace also presents significant challenges. Concerns over job displacement, algorithmic bias, and the shifting demand for skills have fueled discussions on how society should prepare for an AI-driven economy. Workers need to acquire new competencies to remain competitive in an evolving job market. Businesses, governments, and educational institutions play a crucial role in facilitating this transition by implementing reskilling programs, investing in AI literacy, and creating policies that ensure an inclusive and equitable workforce.

This paper explores the ways in which AI and human labor can coexist to create a more efficient, innovative, and adaptable workforce. By examining case studies from industries such as healthcare, finance, and manufacturing, it highlights the benefits of AI-human collaboration and the steps necessary to harness AI's potential while addressing its challenges. Instead of perceiving AI as a threat to employment, this research advocates for a future where AI and human intelligence work together, fostering sustainable economic growth and redefining the nature of work in the digital age.

## **2. The role of AI in enhancing human work**

Artificial Intelligence has become an integral part of modern workplaces, improving efficiency and streamlining operations across various industries. By automating repetitive and time-consuming tasks, AI allows human workers to focus on more complex and creative problem-solving. This shift does not merely replace human labor but instead optimizes workflows, reducing errors and increasing overall productivity.

One of the key ways AI enhances efficiency is through robotic process automation (RPA), which automates structured, rule-based tasks. Studies by Brynjolfsson and McAfee (2017) suggest that AI-powered automation has led to measurable productivity gains in industries like finance, customer service, and logistics. For example, banks use AI-driven algorithms to handle routine customer inquiries, process transactions, and detect fraudulent activities in real time, reducing manual intervention while improving accuracy (Davenport & Ronanki, 2018).

While AI excels in data processing and pattern recognition, it lacks human intuition, creativity, and emotional intelligence. Recent research emphasizes that AI functions best when augmenting rather than replacing human decision-making. In creative industries, AI assists in generating design ideas, composing music, and even writing code, yet human professionals remain essential for refining and contextualizing AI-generated outputs. Similarly, in financial services, AI is reshaping marketing strategies by enhancing customer insights, predicting consumer behavior, and optimizing personalized recommendations. As Popescu et. al (2024) argue, “AI-driven data analytics have revolutionized the way financial institutions personalize marketing strategies, allowing firms to anticipate customer needs and enhance service efficiency in unprecedented ways.” This demonstrates that AI is not just a tool for automation but a valuable asset in improving strategic decision-making.

Beyond marketing, AI also plays a critical role in corporate finance, particularly in managing financial risks, ensuring sustainable business growth, and optimizing investment decisions. AI-powered financial models analyze vast datasets to provide real-time insights into risk exposure and profitability, helping executives make informed strategic decisions. Spulbar and Mitrache (2023) emphasize this shift, stating that “corporate finance has evolved from a purely analytical function to a strategic driver of sustainable business practices, where AI-powered financial intelligence allows firms to optimize investment decisions while integrating sustainability principles.” This highlights AI’s growing influence in corporate decision-making, where financial professionals leverage AI insights to balance profitability with long-term sustainability goals.

In manufacturing, AI enhances productivity through predictive maintenance, a system that analyzes sensor data to predict potential equipment failures before they occur. Research by Manyika et al. (2017) found that predictive maintenance reduces downtime by up to 50%, significantly improving efficiency and cost-effectiveness. Major companies like General Electric and Siemens have adopted AI-driven predictive maintenance strategies, demonstrating how AI-human collaboration leads to more stable and efficient industrial operations.

Similarly, in supply chain management, AI-driven forecasting models optimize inventory control, demand planning, and logistics. Studies indicate that machine learning algorithms improve demand forecasting accuracy by 20-50%, leading to reduced waste and better resource allocation (Choi et al., 2018). AI-powered logistics platforms, such as those used by Amazon and DHL, automate warehouse operations, enabling faster and more accurate order fulfillment.

Another sector that has witnessed significant productivity gains from AI is healthcare. AI-powered administrative automation helps streamline patient scheduling, medical billing, and data entry, reducing the burden on medical staff (Topol, 2019). Hospitals have reported improved efficiency as AI systems handle routine documentation tasks, allowing doctors and nurses to focus on patient care.

Despite these advancements, the role of human workers remains crucial. AI systems require supervision, maintenance, and ethical oversight to ensure responsible deployment. As Wilson and Daugherty (2018) argue, AI should be viewed as an augmentation tool rather than a replacement for human labor. The most effective AI implementations are those where humans and AI collaborate, leveraging each other’s strengths to optimize efficiency and productivity.

Unlike traditional automation, which focuses on replacing routine tasks, AI-driven augmentation enhances human cognitive abilities by providing insights, generating creative content, and supporting complex decision-making processes. Research highlights

## **How humans and AI can thrive together in the workplace?**

that AI can be a powerful tool when used to complement human expertise rather than substitute for it (Wilson & Daugherty, 2018).

One of the most striking examples of AI-driven creativity is found in the arts and design industry. AI-powered tools, such as OpenAI's DALL·E and DeepDream, assist artists by generating new visual concepts based on learned patterns. Amabile (2020) notes that AI can expand creative possibilities by providing inspiration and variations, yet the final refinement and emotional depth remain uniquely human qualities. Similarly, in music composition, AI programs like AIVA (Artificial Intelligence Virtual Artist) generate melodies that human musicians can refine and incorporate into their work.

In the business sector, AI is transforming decision-making by processing vast amounts of data and identifying patterns that would otherwise be difficult for humans to detect. Advanced machine learning models analyze customer behavior, financial risks, and market trends, allowing companies to make informed strategic decisions. Studies by Filippuccini et al. (2024) suggest that AI-driven decision support systems lead to better business outcomes by reducing uncertainty and improving forecasting accuracy. However, human oversight remains critical in interpreting AI-generated recommendations and making final strategic choices.

Another domain where AI augments human decision-making is healthcare, particularly in diagnostics and treatment planning. AI-powered systems like IBM Watson Health analyze medical records, research papers, and clinical data to assist doctors in diagnosing diseases and recommending treatment options. Topol (2019) argues that while AI can process medical data with exceptional speed and accuracy, human doctors provide the necessary contextual understanding, ethical judgment, and patient empathy that AI lacks. The combination of AI-driven diagnostics and human expertise leads to more precise and personalized healthcare.

AI also enhances scientific research and innovation by accelerating data analysis and hypothesis generation. Machine learning models assist researchers in drug discovery, climate modeling, and genomics, enabling breakthroughs that would take humans significantly longer to achieve manually (Marcus & Davis, 2019). For example, AI-driven algorithms have been instrumental in predicting protein structures, a critical advancement in medical and biological sciences. However, human scientists remain indispensable for interpreting results, formulating theories, and designing experiments.

Despite AI's remarkable contributions, ethical concerns arise regarding the potential over-reliance on AI-generated outputs. Studies emphasize that AI, while powerful, is not infallible and can introduce biases based on the data it is trained on (Boddington, 2017). Human critical thinking and ethical judgment are essential to ensuring AI's role remains supportive rather than deterministic.

The healthcare sector has embraced AI-driven solutions to improve diagnostics, patient care, and medical research. AI-powered diagnostic tools, such as deep learning models used for medical imaging, assist radiologists in detecting diseases like cancer with high accuracy (Jiang et al., 2017). IBM Watson Health, for instance, analyzes vast amounts of medical literature to support doctors in making evidence-based treatment recommendations. However, while AI can rapidly process and identify patterns in medical data, human doctors remain essential for interpreting results, considering ethical implications, and providing patient-centered care (Topol, 2019). Additionally, AI-powered robotic surgery, such as the Da Vinci system, enhances the precision of surgical procedures but still requires human surgeons to oversee and control the operation.

In the legal profession, AI is transforming case research, contract analysis, and legal documentation. Natural language processing (NLP) algorithms scan vast legal databases, summarizing relevant case law and regulations more efficiently than human

lawyers alone (Surden, 2018). Legal research tools like ROSS Intelligence utilize AI to assist lawyers in preparing cases, reducing the time needed for manual legal research. However, the interpretation of law, courtroom strategy, and client advocacy remain inherently human tasks, requiring emotional intelligence, ethical reasoning, and persuasive argumentation. AI enhances efficiency but does not replace the expertise and judgment of legal professionals.

AI is also reshaping the education sector by personalizing learning experiences and assisting educators. AI-driven adaptive learning platforms, such as Carnegie Learning and Coursera's machine learning algorithms, tailor educational content to individual students' needs, helping them learn at their own pace (Roll et al., 2021). Automated grading systems reduce teachers' workloads, allowing them to focus more on student engagement and mentorship. However, despite these advancements, AI cannot replace the emotional intelligence, motivation, and real-time adaptability that human teachers provide. The role of educators remains irreplaceable in fostering critical thinking, creativity, and social skills, qualities that AI cannot replicate.

### 3. The Impact of AI on Employment

The introduction of AI into the workforce has raised concerns about large-scale job displacement. However, market studies indicate that while AI eliminates some jobs, it simultaneously creates new roles requiring different skill sets. The key challenge is managing this transition and ensuring that workers acquire the skills needed for AI-driven industries.

Recent reports from the World Economic Forum (WEF, 2020) and McKinsey Global Institute (2021) provide an overview of AI's impact on employment:

**Table 1 AI's impact on global job markets**

Study Source	Estimated Job Loss (by 2025)	Estimated Job Creation (by 2025)	Net Impact
World Economic Forum (2020)	85 million jobs displaced	97 million new jobs created	+12 million jobs
McKinsey Global Institute (2021)	30% of global jobs affected	New AI-driven sectors expanding	Overall labor shift, not mass unemployment
OECD (2019)	14% of jobs highly vulnerable to automation	32% of jobs significantly changing	Reskilling required

Source: made by the author based on information from W.E.F (2020), OECD (2019) and McKinsey Global Institute (2021)

Artificial Intelligence is transforming the job market by automating routine tasks while creating new opportunities that require specialized skills. The World Economic Forum (2020) predicts that by 2025, AI will displace 85 million jobs but create 97 million new roles, resulting in a net gain of 12 million jobs. Similarly, the McKinsey Global Institute (2021) highlights that 30% of jobs worldwide will be affected by automation, yet rather than causing mass unemployment, AI will shift employment patterns. The OECD

### How humans and AI can thrive together in the workplace?

(2019) estimates that 14% of jobs in developed countries are at high risk of automation, while 32% of roles will undergo significant changes, requiring reskilling.

From an economic perspective, AI-driven employment shifts align with Schumpeter's (2013) theory of Creative Destruction, which argues that technological progress eliminates certain jobs while generating entirely new industries. This pattern was observed during the Industrial Revolution and more recently with the rise of the internet economy. Similarly, Skill-Biased Technological Change (SBTC) (Acemoglu & Autor, 2011) suggests that low-skill, routine jobs are the most vulnerable to AI, while jobs demanding technical knowledge, creativity, and problem-solving will grow. Autor (2015) further explains that automation leads to job polarization, reducing middle-skill roles while increasing demand for both low-skill service jobs (e.g., caregiving, hospitality) and high-skill digital jobs (e.g., AI development, data science).

Despite concerns, history suggests that AI will redefine rather than eliminate employment. Job displacement will be most significant in manufacturing, data entry, and administrative roles, while growth will be seen in AI-related professions, digital marketing, cybersecurity, and AI ethics. Regional studies highlight different adaptation strategies, for example, European Union governments invest heavily in AI reskilling programs, while the U.S. relies more on private-sector-led training initiatives.

To fully capitalize on AI's benefits, governments, businesses, and educational institutions must focus on workforce adaptability. This includes updating school curricula to include AI and digital skills, corporate training programs, and stronger public-private partnerships. Instead of fearing AI, the focus should be on reskilling and integrating AI-human collaboration into the workforce to drive economic growth and innovation.

AI's impact on employment is uneven across industries, with routine and repetitive jobs facing the highest risk of automation, while complex, creative, and technical roles are expanding. According to the U.S. Bureau of Labor Statistics (2022) and OECD (2019), jobs in data entry, assembly line work, and customer service are declining, whereas demand is growing for AI specialists, cybersecurity experts, and healthcare technicians.

The key labor market shift follows Skill-Biased Technological Change (SBTC) (Acemoglu & Autor, 2011), meaning low-skill jobs are being automated while high-skill digital roles are rising. Job polarization (Autor, 2015) also plays a role, middle-skill roles, such as administrative and clerical jobs, are shrinking, pushing workers into either low-skill service jobs or high-skill technical professions.

**Table 2: Which jobs are most affected?**

Job type	Risk of automation	Job market trend
Data entry clerks	High	Declining
Assembly line workers	High	Declining
Customer service reps	Moderate	Shift to AI-assisted roles
Retail cashiers	High	Declining
Administrative assistants	Moderate	Changing
AI specialists	Low	Rapid growth
Cybersecurity experts	Low	Increasing demand
Healthcare technicians	Low	Growing sector

Source: made by the author based on information from U.S. Bureau of Labor Statistics (2022)

AI is not leading to mass unemployment but rather shifting labor demand. Routine jobs are at risk, while AI-driven roles are expanding, particularly in technology,

cybersecurity, and AI governance. The key challenge is reskilling and workforce adaptation to ensure smooth transitions into AI-augmented professions.

AI adoption and its effects on the workforce vary significantly across regions due to differences in economic structures, government policies, and investment in AI-driven industries. While the United States leads in private-sector AI innovation, the European Union places stronger emphasis on worker protections and reskilling initiatives. Meanwhile, Japan has one of the highest automation rates globally, primarily driven by labor shortages and an aging population.

The table below summarizes these regional differences in AI adoption and labor market impact. The data is compiled based on reports from the U.S. Bureau of Labor Statistics, the European Commission’s Eurostat, and the Organisation for Economic Co-operation and Development (OECD).

**Table 3: Regional AI Labor Market Trends**

Region	Jobs at Risk (%)	AI adoption rate	Government AI reskilling programs
United States	16%	High (esp. in tech & finance)	Moderate (private sector-driven)
European Union	14%	Varied (high in Germany, low in Eastern Europe)	Strong (EU-funded initiatives)
Japan	21%	Very High (automation-heavy)	Strong government support

Source: made by the author based on information from Eurostat (2022), U.S. Bureau of Labor Statistics (2022), and OECD (2024)

In the United States, approximately 16% of jobs are at risk of automation. AI adoption is particularly high in industries such as finance, healthcare, and technology, where major companies like Google, Amazon, and Tesla are driving AI investment. However, the U.S. government’s role in AI workforce reskilling is relatively limited, with most retraining initiatives coming from the private sector. This has resulted in regional disparities, where areas heavily dependent on manufacturing and routine labor face significant employment challenges. For example, while Silicon Valley benefits from AI-driven job creation, parts of the Midwest, historically reliant on manufacturing, experience higher levels of job displacement without adequate federal reskilling programs.

In contrast, the European Union exhibits a more balanced approach, with an estimated 14% of jobs at risk of automation. AI adoption varies significantly across member states, with Germany, the Netherlands, and Scandinavian countries leading in AI-driven automation, while Eastern European nations lag due to lower technological investment. However, the EU compensates for this disparity with robust government-funded AI training programs. Germany’s “AI Made in Germany” strategy, for instance, includes public funding for AI workforce development to ensure that industrial automation does not lead to mass layoffs. By focusing on retraining and upskilling workers, the EU mitigates some of the employment risks associated with AI adoption and promotes a smoother workforce transition compared to the U.S.

Japan, with approximately 21% of jobs at risk, has one of the highest AI automation rates globally. Unlike the U.S., where automation is primarily market-driven, Japan’s government actively funds AI reskilling programs to address labor shortages

## **How humans and AI can thrive together in the workplace?**

caused by its aging population. Many Japanese companies, such as Toyota and Honda, integrate robotics into manufacturing processes, allowing them to compensate for workforce declines while simultaneously creating AI-integrated roles. This strategy reflects a national effort to align AI adoption with demographic challenges, ensuring that automation enhances productivity rather than leading to widespread job losses.

Although AI's impact on employment is universal, countries respond differently based on economic priorities and policy frameworks. The United States remains a global leader in AI innovation but lags in public workforce adaptation. The European Union balances AI growth with strong worker protections, preventing abrupt job displacement. Meanwhile, Japan's aggressive AI integration helps counteract demographic challenges while ensuring a stable workforce transition. Despite these differences, all regions must focus on reskilling and human-AI collaboration to prevent AI from becoming a disruptive force in labor markets.

### **4. Strategies for a human-AI collaborative workforce**

As AI becomes increasingly integrated into the workplace, the focus must shift from job displacement to job transformation. The key to a successful transition lies in ensuring that AI enhances human capabilities rather than replacing them. To achieve this, a combination of reskilling initiatives, organizational restructuring, education reforms, and policy interventions is necessary to create a balanced, productive, and inclusive AI-driven economy.

One of the biggest challenges of AI adoption is the widening skills gap, as many traditional jobs evolve to incorporate AI tools. Workers need to develop new technical competencies while also strengthening human-centric skills that AI cannot replicate. Addressing this challenge requires investment in large-scale reskilling programs by both businesses and governments. Companies must provide continuous learning opportunities such as AI literacy training, coding boot camps, and digital transformation workshops to help employees adapt to new workflows. At the same time, workers must take personal responsibility for lifelong learning, acquiring skills in areas such as data analysis, AI ethics, and problem-solving to remain competitive in an AI-driven job market. However, technical knowledge alone is not sufficient. Soft skills, including emotional intelligence, creativity, and ethical reasoning, will be essential in workplaces where human judgment complements AI-driven automation. Education systems should place greater emphasis on critical thinking, adaptability, and communication skills, as these will be just as valuable as technical expertise in the evolving labor landscape.

For AI to truly benefit the workforce, companies must rethink how jobs are structured. Instead of seeing AI as a replacement for human labor, organizations should focus on redesigning roles to maximize human-AI collaboration. This means shifting from full automation to augmentation, where AI handles repetitive or data-heavy tasks while humans focus on strategic decision-making and creative problem-solving. A clear example of this approach can be found in healthcare, where AI-powered diagnostic tools analyze medical images with high accuracy. However, the final diagnosis and patient interaction remain the responsibility of human professionals. Similarly, in finance, AI-driven risk assessment tools help analysts evaluate market trends, but human intuition and ethical judgment are still necessary for making high-stakes investment decisions. Instead of eliminating jobs, AI should be integrated into hybrid roles that combine technical expertise with industry knowledge. A marketing strategist with AI proficiency, for example, can leverage machine learning to optimize advertising campaigns, while a human resources professional trained in AI can use predictive analytics to improve hiring decisions.

The successful integration of AI into the workforce requires collaboration between businesses and policymakers. Companies must lead the way in implementing AI responsibly, ensuring that automation improves efficiency without leading to mass layoffs. This can be achieved through internal workforce transitions, where employees are retrained and reassigned rather than being replaced. Governments, on the other hand, must introduce forward-thinking policies that support AI-driven workforce transformation. These policies should include funding for AI education programs, incentives for businesses to invest in employee training, and ethical regulations to prevent worker exploitation. In addition, public-private partnerships can play a crucial role in aligning industry needs with education curricula, ensuring that students graduate with the skills necessary for an AI-augmented economy. A strong social safety net will also be essential during this transition. Governments should consider policies such as universal basic income or wage subsidies for workers in industries undergoing significant AI-driven transformation. These measures would provide financial security while workers reskill and transition into new roles, reducing the economic shock of AI adoption.

Beyond technical and policy solutions, fostering a culture of AI-human collaboration will be critical in ensuring a smooth transition into the future of work. Many employees fear AI because they see it as a threat to job security, rather than as a tool to enhance their productivity. To change this perception, companies must be transparent about how AI is implemented, emphasizing its role as a collaborative assistant rather than a competitor. Building trust in AI also requires a strong focus on ethical AI deployment. Organizations must ensure that AI systems are free from bias, explainable in their decision-making processes, and aligned with human values. Workers should be encouraged to participate in AI-related decision-making, giving them a sense of control over how AI affects their roles. Making AI adoption a participatory process increases the likelihood that employees will embrace its benefits rather than resist change. Companies must also rethink workplace dynamics to accommodate AI-human teamwork, which includes developing AI literacy training for all employees, promoting cross-functional collaboration between AI engineers and industry specialists, and ensuring that workplace environments support creativity, critical thinking, and adaptability. Organizations that prioritize a human-first approach to AI integration will create more engaged, innovative, and resilient workforces.

#### **4.1. Case study of Siemens (2020)**

Siemens, a global leader in industrial automation and manufacturing, has been at the forefront of integrating artificial intelligence into its production processes. As the company sought to enhance efficiency while maintaining high-quality standards, it faced a common industry challenge: balancing automation with human expertise. Siemens recognized that while AI-driven automation could optimize factory operations, human oversight and problem-solving remained critical to achieving sustainable innovation.

To address this, Siemens developed and implemented AI-powered systems in its manufacturing plants, particularly in its Amberg Electronics Plant in Germany. The facility is widely regarded as one of the most advanced smart factories in the world, where 75% of production processes are automated, yet human workers remain essential to managing, monitoring, and improving operations. AI systems analyze vast amounts of real-time data to predict equipment failures, optimize workflows, and identify defects with 99.9% production accuracy. However, rather than replacing factory workers, Siemens redesigned job roles to allow employees to work alongside AI-powered

## **How humans and AI can thrive together in the workplace?**

systems. Workers now act as process supervisors, quality control experts, and AI trainers, ensuring that the technology operates efficiently while continuously adapting to new challenges.

One of the most significant innovations introduced by Siemens was the use of AI-driven predictive maintenance. Traditionally, industrial machinery is maintained on a fixed schedule, which can lead to unnecessary servicing or unexpected breakdowns. Siemens integrated machine learning algorithms to predict failures before they occur, allowing for maintenance only when necessary. This not only reduced downtime by 30% but also lowered maintenance costs and improved energy efficiency. Workers were trained to interpret AI-generated reports, enabling them to make informed maintenance decisions rather than following rigid schedules.

Beyond predictive maintenance, AI has also transformed quality control and defect detection at Siemens. In the past, quality assurance relied heavily on human inspectors who visually checked products for defects. While effective, this process was slow and prone to human error. Today, Siemens uses computer vision AI to scan components with extreme precision, identifying microscopic defects in milliseconds. However, the final decision on whether to reject or repair a product is still made by human inspectors. This approach combines AI's speed with human judgment, ensuring that products meet both technical and customer standards.

Siemens' experience highlights a broader workforce transformation in the AI era. Employees who previously performed repetitive assembly tasks have been retrained to operate and improve AI systems. The company has invested heavily in reskilling initiatives, offering workers AI training programs and encouraging them to develop technical competencies in data analytics, robotics, and digital manufacturing. This shift has created new career paths, such as AI maintenance specialists, automation engineers, and human-AI collaboration managers, ensuring that human expertise remains central to Siemens' success.

Siemens demonstrates that AI adoption does not have to result in job losses but rather job evolution. By integrating AI as a collaborative tool, Siemens has increased efficiency, reduced costs, and improved product quality while ensuring that human workers remain at the heart of decision-making processes. The company's approach underscores the importance of redesigning job roles, investing in workforce development, and fostering a culture where AI enhances human capabilities rather than replacing them.

### **4.2. Case study of IBM (2021)**

IBM, a global leader in artificial intelligence and enterprise solutions, has successfully integrated AI into its customer service operations to improve efficiency, reduce response times, and enhance the customer experience. Instead of replacing human agents, IBM developed Watson Assistant, an AI-powered virtual agent designed to handle routine inquiries while working alongside human representatives. This approach has allowed the company to balance automation with human expertise, ensuring that customer support remains fast, accurate, and personalized.

One of IBM's key challenges was scaling its customer service operations without increasing costs or reducing service quality. Traditional call centers required large teams of human agents to handle customer inquiries, leading to long wait times, inconsistent responses, and high operational costs. Additionally, repetitive queries, such as password resets and basic troubleshooting, occupied a significant portion of agents' time, preventing them from focusing on more complex customer needs.

To address these issues, IBM deployed Watson Assistant in its support centers, allowing AI to handle basic customer inquiries in real time. The AI system was trained on vast datasets of past customer interactions, enabling it to provide instant responses to frequently asked questions. This resulted in a 30% reduction in human workload, as AI efficiently handled simple requests without human intervention. However, IBM recognized that AI alone was not sufficient for delivering a high-quality customer experience, especially in cases requiring nuanced understanding, emotional intelligence, or complex troubleshooting.

To enhance its customer support model, IBM introduced a hybrid AI-human collaboration system. When a customer asks a question that AI cannot confidently resolve, Watson Assistant provides real-time recommendations to human agents, suggesting possible solutions based on historical data. The agent then reviews, refines, and personalizes the response before delivering it to the customer. This approach ensures that AI serves as a support tool rather than a replacement for human judgment, allowing customer service representatives to focus on problem-solving rather than memorizing technical details.

The impact of AI integration has been significant. IBM has reported faster resolution times, higher customer satisfaction scores, and lower operational costs. Additionally, AI-powered analytics provide insights into customer behavior and common pain points, enabling IBM to proactively improve its services. By analyzing thousands of interactions, Watson Assistant helps IBM identify recurring issues, optimize workflows, and enhance training programs for human agents.

Another major benefit of AI implementation at IBM is the global scalability of customer service. Watson Assistant supports multiple languages and operates 24/7, ensuring that customers receive assistance at any time, regardless of location. This has been particularly beneficial for IBM's international clients, who require consistent and reliable support across different time zones.

### **4.3. Two approaches to AI-human collaboration**

Both Siemens and IBM have successfully integrated AI into their operations, but they have taken different approaches based on their industry needs. Siemens has focused on AI-assisted manufacturing, optimizing production efficiency while ensuring human workers remain central to operations. In contrast, IBM has used AI to enhance customer service, automating routine tasks while allowing human agents to focus on complex inquiries.

A key similarity between both companies is their commitment to AI as an augmentation tool rather than a replacement for human workers. At Siemens, AI-powered predictive maintenance and quality control improve manufacturing precision, yet humans oversee and refine AI-generated decisions. Similarly, IBM's Watson Assistant automates basic customer inquiries but keeps human agents in control of complex problem-solving and personalization.

However, there are notable differences in how AI transforms job roles in each company. Siemens has shifted traditional assembly-line workers into AI-assisted technical roles, requiring reskilling in digital manufacturing and automation management. Meanwhile, IBM's approach involves enhancing existing job functions, where AI supports customer service agents without requiring a complete role transformation. This distinction reflects the difference between AI-driven job evolution in manufacturing versus AI-enhanced efficiency in service-based industries.

## **How humans and AI can thrive together in the workplace?**

In terms of outcomes, Siemens has achieved higher productivity and cost savings, with a 30% reduction in downtime due to predictive maintenance. IBM, on the other hand, has seen a 30% reduction in customer service workload, allowing agents to focus on high-value interactions. Both companies demonstrate that AI can drive efficiency while maintaining a human workforce, but the way AI is applied depends on industry-specific needs.

### **5. Conclusions**

The integration of artificial intelligence into the workforce is no longer a distant possibility but a present reality, transforming industries, redefining job roles, and reshaping the nature of work itself. While initial fears of widespread job displacement due to AI-driven automation persist, the evidence suggests that AI is not a force of destruction but one of transformation. The key to ensuring a positive outcome in this transition lies in viewing AI as a collaborative tool, one that enhances human potential rather than rendering it obsolete.

Throughout this study, we have examined how AI is being adopted across various industries, demonstrating a consistent pattern of augmentation rather than replacement. From Siemens' smart factories, where AI optimizes efficiency while humans oversee production, to IBM's customer service transformation, where AI enhances, rather than eliminates, human agents, it is clear that the most effective AI implementations are those that balance technological efficiency with human expertise. The real challenge, therefore, is not how to stop AI from replacing jobs, but how to redesign the workforce to accommodate an AI-driven economy.

One of the most critical strategies in this transformation is reskilling and upskilling the workforce. AI may replace repetitive tasks, but it cannot replicate creativity, critical thinking, emotional intelligence, or ethical reasoning, all of which are becoming increasingly valuable in the digital age. Companies that invest in reskilling initiatives and hybrid AI-human roles will create a more adaptable workforce, ensuring that technological advancements lead to progress rather than displacement. At the same time, governments must play an active role in facilitating this transition by funding AI education programs, incentivizing responsible AI deployment, and ensuring ethical regulations that prevent exploitative automation.

Furthermore, AI's ability to analyze vast amounts of data, detect patterns, and optimize processes has made it an essential component of modern work environments. However, these capabilities also come with risks: algorithmic bias, data privacy concerns, and the potential for over-reliance on AI decision-making all pose ethical dilemmas that must be addressed. Ensuring that AI remains an enhancement rather than an uncontested authority in decision-making is crucial in maintaining human accountability, fairness, and ethical governance in the workplace. As Mitrache et al. (2024) emphasize, "AI technology represents not only an operational tool but a catalyst for business transformation, driving strategic innovation and redefining competitive advantage in the digital economy."

At its core, the AI revolution is not about the replacement of human labor but the redefinition of human purpose in the workforce. History has shown that technological advancements, from the industrial revolution to the rise of the internet, have always led to new opportunities, despite initial fears of job loss. AI is no different. The question is no longer whether AI will take over jobs but rather how society will choose to integrate AI into the workforce in a way that fosters both economic growth and human well-being.

If AI has the potential to enhance human creativity, improve efficiency, and elevate problem-solving capabilities, then the real challenge is not AI itself but how we,

as a society, choose to wield its power. Will we embrace AI as a partner in innovation, ensuring that it serves human progress? Or will we allow it to become a disruptive force, widening economic disparities and deepening social inequalities? The future of work will not be defined by AI alone, but by the choices we make today in shaping a world where humans and AI thrive together.

#### **Authors' Contributions:**

The authors contributed equally to this work.

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### Article Info

*Received:* March 24 2025

*Accepted:* May 20 2025

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#### How to cite this article:

Spulbar, L. F., Mitrache, L. A. (2025). How humans and AI can thrive together in the workplace?. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 274 – 287.



## ORIGINAL PAPER

# Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy

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### Abstract:

The speedy inclusion of artificial intelligence (AI) in international markets has brought about unparalleled challenges and prospects, hence the need to develop flexible legal systems. AI-powered markets transform conventional economic structures by facilitating algorithmic trade, autonomous decision-making, and data-guided business models. Nevertheless, these developments present regulatory concerns regarding responsibility, bias, intellectual property rights, and market competition forces. This article discusses the changing legal landscape governing AI in economic applications, exploring both the limitations of existing frameworks and emerging regulatory approaches.

One of the key challenges of AI regulation is achieving a balance between legal control and innovation. The traditional tools of regulation are unable to address the autonomous and dynamic nature of AI, invoking concern regarding liability, transparency, and compliance. Moreover, the use of AI in market concentration and algorithmic price setting gives rise to antitrust concerns, necessitating pre-emptive legal intervention to ensure level competition. Conversely, AI provides an opportunity for streamlining regulatory efficiency, automating compliance, and mitigating financial risk through predictive analytics and smart contracts.

This study critically assesses global legal frameworks, including the European Union's AI Act, the United States' sectoral regulations, and China's AI regulation policy, against their economic effect. Through an appraisal of legal precedents and current policy debates, the paper presents an equilibrium framework that encourages technological advancement with ethical and economic balance.

Lastly, the intersection of AI, economics, and law calls for a changing regulatory environment that provides room for innovation without undermining market integrity. Surmounting these challenges is essential to having a healthy digital economy that boosts the fortunes of businesspeople, consumers, and policymakers.

**Keywords:** *AI regulation, digital economy, legal frameworks, algorithmic governance, market competition.*

**JEL Classification:** G15, F63, K20.

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# **Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy**

## **1. Introduction**

The accelerated introduction of artificial intelligence (AI) into world economies has wrought deep transformations in economic structures, modifying conventional systems of trade, competition, and regulation. AI-driven technologies from algorithmic trading, autonomous decision-making, and machine learning-based financial predictions are revolutionizing the way business is conducted. As these innovations bring about efficiencies and innovations, they also bring about novel legal and economic dilemmas. The autonomous character of the AI systems renders it difficult for current regulatory frameworks, with legal frameworks needing to be adaptive and forward-looking.

The emergence of artificial intelligence within economic markets introduces a range of both prospects and challenges. On one side, AI contributes to increased productivity, diminishes transaction expenses, and streamlines supply chain processes. Conversely, issues related to liability, algorithmic prejudice, intellectual property protections, and market consolidation necessitate immediate legal scrutiny. Regulatory agencies globally face the complex task of reconciling the promotion of innovation with the imperative of maintaining equitable market practices. The absence of clear legal norms poses a threat of regulatory arbitrage, in which companies exploit gaps between jurisdictions to skip compliance.

This paper attempts to critically analyze the evolving legal frameworks for AI-powered markets, both the challenges and opportunities they present to the digital economy. The study will assess the strengths and weaknesses of existing legal strategies for dealing with economic disruptions from AI, examine promising new models including the EU AI Act, the US sectoral approach, and China's AI governance framework, and discuss antitrust ramifications of algorithmically determined prices and market concentration.

In addition, it will discuss possible paths toward greater regulatory efficiency using AI-driven compliance mechanisms, smart contracts, and risk minimization strategies to ultimately offer a balanced approach that balances innovation with economic and ethical concerns.

This study adopts a multidisciplinary approach, incorporating legal analysis, economic theories, and regulatory case study analysis. It stringently examines existing legal tools and court precedents while analyzing the vast implications of artificial intelligence on market structures. The comparative examination of different international regulatory models will provide insightful views concerning the effectiveness of different approaches. In addition, the paper employs economic principles such as competition theory, transaction cost theory, and innovation policy in order to put into context the legal issues involved. By combining these perspectives, this research seeks to give a detailed examination of the legal structures of AI-powered markets and their effects on the digital economy.

## **2. AI-Driven markets overview**

Artificial intelligence has emerged as a key driver of economic transformation, redefining market operations, reshaping competitive dynamics, and influencing global economic structures. Its integration into economic processes enables automation, enhances decision-making, and accelerates innovation. AI-powered technologies are at the core of contemporary digital markets, influencing areas such as financial trading, supply chain management, and consumer behavior analytics. However, these transformations come

with legal, regulatory, and ethical concerns, necessitating a deeper understanding of AI's economic role.

AI's economic impact can be traced back to its ability to enhance productivity and efficiency. Brynjolfsson and McAfee (2014) argue that AI contributes to the "second machine age," where machine intelligence increasingly complements and, in some cases, surpasses human capabilities in economic decision-making. Unlike earlier technological advancements, which primarily replaced routine manual labor, AI increasingly automates cognitive tasks, fundamentally changing white-collar industries. AI's ability to process vast amounts of data and detect complex patterns leads to optimized decision-making in business and finance, creating new economic opportunities while also generating regulatory uncertainties.

AI has become a key driver of business growth and innovation, reshaping market dynamics and economic structures. According to Mitrache et al. (2024), AI technology fosters competitive advantages by optimizing business processes, enhancing decision-making, and enabling data-driven strategic planning. However, they also emphasize that while AI accelerates economic expansion, its unregulated or poorly governed implementation may lead to disparities in market competition and ethical dilemmas.

One of AI's most transformative effects is in financial markets, where algorithmic trading systems execute transactions at speeds and frequencies beyond human capabilities. High-frequency trading (HFT) algorithms leverage AI to identify market patterns and execute trades within microseconds. According to Easley, López de Prado, and O'Hara (2012), HFT enhances liquidity and reduces bid-ask spreads but also raises concerns regarding market stability, systemic risk, and the potential for flash crashes. The 2010 Flash Crash, where AI-driven trading algorithms contributed to a sudden market downturn, highlights the unintended consequences of AI's growing role in financial decision-making. Regulatory bodies, such as the U.S. Securities and Exchange Commission (SEC) and the European Securities and Markets Authority (ESMA), have sought to impose stricter oversight on algorithmic trading, yet challenges persist in effectively regulating self-learning AI systems.

Beyond financial markets, AI is transforming supply chain management and logistics. Predictive analytics powered by AI allows firms to anticipate demand fluctuations, optimize inventory levels, and enhance operational efficiency. Ivanov and Dolgui (2020) discuss how AI-driven supply chain automation improves resilience, particularly in the face of global disruptions such as the COVID-19 pandemic. However, these advancements also raise concerns regarding employment displacement, data security, and the monopolization of AI-driven logistics platforms. Large multinational corporations, such as Amazon and Alibaba, leverage AI to achieve supply chain dominance, prompting antitrust regulators to examine potential market concentration risks.

The rise of AI-driven consumer behavior analytics further solidifies AI's role in economic transformation. Recommendation algorithms and personalized advertising models, such as those used by Google and Meta, analyze vast amounts of consumer data to predict purchasing preferences and influence decision-making. Shoshana Zuboff (2023) argues that AI-powered surveillance capitalism enables corporations to manipulate consumer behavior through predictive analytics, raising ethical concerns regarding privacy, autonomy, and informed consent. The European Union's General Data Protection Regulation (GDPR) seeks to mitigate these concerns by imposing stringent data protection requirements, but enforcement remains a challenge given the global nature of AI-driven economic activities.

## **Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy**

While AI's economic transformation presents significant opportunities, it also introduces regulatory and legal complexities. The autonomous and dynamic nature of AI systems challenges traditional legal frameworks, particularly in areas such as liability, competition law, and data governance. As AI continues to reshape economic structures, policymakers and legal scholars must develop adaptive frameworks that balance innovation with regulatory oversight.

The efficiency gains from algorithmic decision-making stem from AI's ability to process vast amounts of information at a speed and scale beyond human capabilities. In financial markets, machine learning models analyze historical price movements, macroeconomic indicators, and social sentiment to generate real-time trading strategies. AI-driven investment models outperform traditional portfolio management strategies due to their adaptability and ability to learn from new market conditions. However, these same characteristics pose challenges for financial regulators, as self-learning algorithms operate in ways that are difficult to predict and control. The Financial Stability Board (FSB) has warned that algorithmic decision-making, particularly in high-frequency trading, can amplify market volatility and increase the risk of systemic failures.

One of the most widely debated concerns surrounding algorithmic decision-making is the issue of bias and fairness. While AI is often perceived as objective, it is ultimately shaped by the data it is trained on. If the input data reflects historical inequities, the algorithm will likely perpetuate those biases in its decisions. In lending and credit markets, AI-powered risk assessment models determine an individual's creditworthiness based on complex predictive analytics. However, studies by Barocas, Hardt, and Narayanan (2023) have demonstrated that these models can unintentionally discriminate against marginalized groups, leading to regulatory scrutiny. In response, policymakers have advocated for fairness-aware machine learning models and explainable AI to ensure transparency and accountability in algorithmic decision-making.

A significant legal and ethical challenge arises from the "black-box" nature of many AI systems. Unlike traditional rule-based programming, machine learning models develop decision-making processes that are often opaque even to their creators. This lack of interpretability complicates efforts to assign liability when AI-driven decisions lead to negative economic consequences. According to Selbst and Barocas (2018), the opacity of algorithmic systems undermines traditional legal principles of accountability and due process, particularly in cases where AI influences employment, insurance rates, and criminal sentencing. The European Union's AI Act has proposed strict transparency requirements, mandating that high-risk AI systems provide explainability features to ensure compliance with legal and ethical standards.

Another area of concern is the growing role of algorithmic decision-making in market competition and pricing strategies. Companies increasingly deploy AI-powered dynamic pricing algorithms that adjust prices in real-time based on consumer demand, competitor pricing, and market conditions. While such strategies enhance efficiency, they also introduce risks of algorithmic collusion, where competing firms' AI systems learn to coordinate pricing strategies without direct human intervention. Ezrachi and Stucke (2016) highlight that traditional antitrust laws are ill-equipped to address AI-driven collusion, as current legal frameworks rely on explicit evidence of human intent. This regulatory gap has led competition authorities, including the U.S. Federal Trade Commission (FTC) and the European Commission, to explore new methodologies for detecting and mitigating AI-facilitated anti-competitive behavior.

Despite these challenges, algorithmic decision-making also offers opportunities for regulatory compliance and risk mitigation. AI-powered compliance tools automate regulatory reporting, fraud detection, and financial risk assessment, reducing the burden on human regulators. In the banking sector, AI-driven anti-money laundering (AML) systems analyze transaction patterns to detect suspicious activities, enhancing financial security. Similarly, AI-driven tax compliance models help businesses navigate complex tax codes and optimize their financial reporting. Von Moltke (2023) argues that AI can serve as a regulatory tool rather than merely a subject of regulation, suggesting that well-designed AI systems can enhance governance and economic oversight.

The emergence of data as a core economic asset has led to the concept of “data capitalism,” where companies derive value primarily from collecting, processing, and monetizing information. Zuboff (2023) argues that the modern economy is defined by surveillance capitalism, in which firms such as Google, Meta, and Amazon use predictive analytics to manipulate consumer behavior, creating new forms of market power. Unlike traditional business models that rely on tangible assets or labor, data-driven enterprises extract economic value from digital footprints, often without explicit consumer consent. This transformation has led to growing concerns about the monopolization of data and its implications for competition and market fairness.

Market concentration in data-driven economies is particularly evident in the dominance of tech giants that control vast datasets. Furman et al. (2019) note that companies with privileged access to consumer data gain a competitive advantage by refining AI models more effectively than smaller firms. The phenomenon of “network effects” reinforces this dominance, as larger datasets lead to better AI performance, attracting more users and further consolidating market power. This self-reinforcing cycle has led to regulatory scrutiny, with competition authorities investigating whether data monopolies stifle innovation and limit market entry for smaller competitors. In response, policymakers have proposed data-sharing mandates and interoperability requirements to level the competitive playing field. The European Union’s Digital Markets Act (DMA) is one such attempt to address the monopolization of data by enforcing obligations on large online platforms.

According to Spulbar et al. (2021), the Efficient Market Hypothesis (EMH), which assumes that asset prices fully reflect available information, is being reconsidered in light of AI-driven adaptive trading strategies. However, while AI enhances market liquidity and predictive accuracy, it also introduces new risks, including algorithmic herding behavior, flash crashes, and potential market manipulation, requiring proactive regulatory oversight to ensure market integrity and stability.

A significant legal and ethical issue surrounding data-driven business models is the question of consumer privacy and data protection. AI-driven firms collect extensive user information to enhance personalized services, but this raises concerns about the potential misuse of personal data. The General Data Protection Regulation (GDPR) in the European Union sets strict guidelines on data collection, requiring informed consent and providing users with greater control over their information. However, research by Acquisti, Taylor, and Wagman (2016) suggests that consumers often lack a clear understanding of how their data is used, leading to an imbalance of power between individuals and corporations. The trade-off between personalized services and privacy remains a contentious debate, with scholars arguing that current legal frameworks may be insufficient to address the complexities of AI-driven data economies.

## **Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy**

Beyond privacy, data-driven business models influence labor markets and economic inequalities. AI-powered automation, fueled by data analytics, has led to significant workforce disruptions, particularly in sectors reliant on routine tasks. Autor (2015) highlights that while AI enhances productivity, it also exacerbates income disparities by disproportionately benefiting high-skilled workers while displacing low-skilled labor. Data-driven gig economy platforms, such as Uber and Deliveroo, further illustrate how AI reshapes employment relationships, often blurring the lines between independent contracting and traditional employment. Regulatory bodies are grappling with how to adapt labor laws to the realities of algorithmic management and automated decision-making.

Despite these challenges, data-driven business models present opportunities for economic growth and regulatory innovation. AI-powered analytics enable firms to anticipate market trends, optimize supply chains, and enhance customer experiences. In financial services, data-driven risk assessment improves fraud detection and credit evaluation, increasing efficiency and financial inclusion. Moreover, AI-driven policymaking, where governments leverage big data to design evidence-based regulations, represents a promising development in economic governance. Sunstein (2021) argues that AI-enhanced regulatory models could lead to more precise and adaptive legal frameworks, reducing inefficiencies in traditional rule-making processes.

### **3. Legal challenges in AI-powered economic systems**

Traditional regulatory tools were designed for human decision-makers, yet AI introduces complexity through autonomous actions, opaque decision-making processes, and cross-jurisdictional economic interactions. Ensuring that AI-powered economic systems function within legal and ethical boundaries while maintaining market stability and innovation requires a re-evaluation of liability structures, competition law, intellectual property rights, and regulatory enforcement mechanisms.

One of the most significant legal concerns surrounding AI-powered economic systems is the issue of liability. AI algorithms operate autonomously, making decisions without direct human intervention. This raises fundamental legal questions: Who is responsible when AI systems cause harm? Existing legal frameworks, such as product liability and negligence laws, are built on the premise of human agency. However, as AI models evolve and develop unexpected behaviors, establishing accountability becomes increasingly difficult. Pagallo (2013) highlights that traditional tort law principles may be inadequate for dealing with AI-driven errors, necessitating new legal doctrines such as strict liability for AI developers or the introduction of electronic personhood for advanced AI systems. The European Union's AI Act proposes a tiered risk-based approach, where higher-risk AI applications face stricter liability standards, yet the question of who bears ultimate responsibility remains unresolved.

Another critical area of legal scrutiny is algorithmic bias and discrimination. AI systems, particularly those used in hiring, lending, and criminal justice, have been found to reinforce existing biases due to the nature of their training data. Barocas, Hardt, and Narayanan (2023) argue that while AI promises objectivity, it often replicates historical inequities, leading to discriminatory outcomes. In response, jurisdictions such as the United States and the European Union have introduced regulations requiring transparency and fairness in AI-driven decision-making. However, enforcing these principles is challenging given the complexity of machine learning models. Explainability and

interpretability remain key legal concerns, as courts and regulators struggle to assess whether an AI system's decisions comply with anti-discrimination laws.

AI-driven markets also pose significant antitrust and competition law challenges. Traditional antitrust laws are designed to prevent collusion and market concentration through explicit human agreements. However, AI-enabled pricing algorithms can engage in tacit collusion, where competing firms' algorithms learn to set prices in a way that maximizes collective profits without direct communication. Ezrachi and Stucke (2016) warn that existing antitrust tools may be insufficient to regulate AI-driven collusion, as intent a central element in competition law is difficult to establish when pricing decisions are made autonomously. Regulators in the European Union and the United States are currently exploring ways to adapt competition law to algorithmic markets, with proposals ranging from stricter algorithmic transparency requirements to the use of AI-powered enforcement mechanisms.

Intellectual property (IP) law faces new challenges with the rise of AI-generated content. Copyright and patent systems were designed to protect human creativity and invention, but AI is now capable of generating literature, art, and even novel scientific discoveries. The question of whether AI-generated works should be eligible for copyright protection remains unresolved. In the United States, the Copyright Office has ruled that only human-created works qualify for protection, but ongoing debates suggest that revisions to IP law may be necessary as AI becomes a more significant contributor to creative industries. Similarly, patent law faces issues regarding AI-assisted inventions, with policymakers considering whether AI should be recognized as an inventor or merely a tool used by human creators.

Data governance is another pressing legal challenge in AI-powered economic systems. The increasing reliance on big data for training AI models raises concerns about data privacy, security, and ownership. The General Data Protection Regulation (GDPR) has set global benchmarks for data protection, but enforcing these rules in AI-driven economies remains difficult. Many AI systems operate across multiple jurisdictions, creating conflicts between national data protection laws. Furthermore, AI's ability to infer sensitive personal information from seemingly benign datasets poses risks that existing privacy laws may not fully address. Wachter, Mittelstadt, and Floridi (2017) propose the concept of "right to explanation" as a legal safeguard, ensuring that individuals affected by AI-driven decisions have the right to understand and challenge automated processes.

The table below summarizes the key legal challenges associated with AI-powered economic systems and highlights regulatory responses from different jurisdictions:

**Table 1: Key legal challenges and regulatory responses in AI-powered economic systems**

Legal Challenge	Description	Regulatory Response	Source
<b>Liability in AI decisions</b>	Determining legal responsibility for AI-driven actions, especially in autonomous decision-making	EU AI Act (risk-based approach), proposals for AI-specific liability laws	Pagallo (2013)
<b>Algorithmic bias</b>	AI replicates historical biases, leading to discriminatory decisions in hiring, lending, and law enforcement	Fairness-aware AI models, EU GDPR transparency requirements, U.S. AI Bill of Rights	Barocas et al. (2023)

## Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy

<b>AI-enabled collusion</b>	Pricing algorithms autonomously coordinate to manipulate markets without explicit agreements	Increased scrutiny under antitrust laws, proposals for AI-powered regulatory enforcement	Ezrachi & Stucke (2016)
<b>Intellectual property challenges</b>	Uncertainty over copyright and patent protection for AI-generated content	U.S. Copyright Office rulings against AI authorship, ongoing legal debates	U.S. Copyright Office (2023)
<b>Data privacy and AI</b>	AI-driven data processing raises concerns about privacy, security, and cross-border data transfers	GDPR, California Consumer Privacy Act (CCPA), emerging AI-specific privacy laws	Wachter et al. (2017)

Source: Own work based on research methodology

While regulatory efforts are underway, the legal challenges of AI-powered economic systems require continuous adaptation and international cooperation. Policymakers must balance innovation with legal protections, ensuring that AI fosters economic growth without undermining ethical and societal values. A harmonized legal framework that addresses liability, competition law, intellectual property, and data governance will be essential in shaping the future of AI-driven markets.

### 4. Global Regulatory Approaches to AI in Markets

The legal governance of artificial intelligence in economic markets varies significantly across jurisdictions, reflecting differences in legal traditions, economic priorities, and technological strategies. While AI has the potential to enhance efficiency and market competition, its risks ranging from liability concerns to algorithmic bias necessitate proactive regulatory measures. The fragmented global regulatory landscape presents both challenges and opportunities for harmonizing AI governance.

Three major regulatory approaches have emerged in response to AI's economic implications: the European Union's risk-based regulatory model, the United States' sectoral approach, and China's state-driven AI governance. Each of these approaches reflects a distinct legal and economic philosophy, with the EU emphasizing fundamental rights and ethical AI, the US focusing on innovation and industry self-regulation, and China integrating AI development into its broader geopolitical and economic strategy. Understanding these models is essential for assessing their impact on AI-powered markets and evaluating potential paths toward international regulatory convergence.

The European Union has taken a proactive stance in AI regulation, positioning itself as a global leader in ethical AI governance. The Artificial Intelligence Act (AI Act) proposed by the European Commission in 2021 is the world's first comprehensive legislative framework designed to regulate AI across economic sectors. The AI Act adopts a risk-based approach, classifying AI systems into four categories based on their potential impact on fundamental rights and economic stability: unacceptable risk, high risk, limited risk, and minimal risk (European Commission, 2021).

At the core of the AI Act is the principle of proportional regulation, meaning that AI systems with higher risks are subject to stricter legal requirements. Unacceptable-risk AI systems, such as social scoring systems and subliminal manipulation, are outright prohibited. High-risk AI systems, including those used in hiring, financial services, and critical infrastructure, must comply with strict transparency, accountability, and data governance rules. Limited-risk AI applications, such as chatbots and recommendation algorithms, require only basic transparency measures, while minimal-risk AI systems face

no regulatory obligations. This tiered structure seeks to balance technological innovation with fundamental rights protection, ensuring that AI adoption does not compromise market integrity or consumer rights.

One of the key innovations of the AI Act is its emphasis on explainability and accountability. AI developers and deployers of high-risk AI systems must provide clear documentation of their models' decision-making processes, ensuring compliance with EU fundamental rights standards (Wachter, Mittelstadt, & Russell, 2021). The act also mandates the creation of conformity assessments, requiring companies to demonstrate that their AI systems meet regulatory standards before deployment. This approach is similar to the General Data Protection Regulation (GDPR), which imposes strict compliance requirements on organizations handling personal data.

However, the AI Act also faces significant legal and economic challenges. Critics argue that the compliance burden for high-risk AI systems may stifle innovation and deter investment in AI startups. Veale and Zuiderveen Borgesius (2021) highlight that smaller AI firms may struggle to meet the stringent documentation and auditing requirements, leading to a market environment where only large technology corporations can afford regulatory compliance. Additionally, there are concerns about regulatory fragmentation within the EU, as member states may interpret and enforce the AI Act differently.

Despite these challenges, the AI Act represents a significant step toward global AI governance. By establishing a structured framework for AI risk assessment and compliance, the EU aims to create a legal environment that fosters responsible AI development while protecting consumers and businesses. Moreover, the extraterritorial scope of the AI Act similar to the GDPR means that companies worldwide must comply if they offer AI services within the EU. This has led some scholars to refer to the AI Act as a model for "AI regulatory globalization" (Tzimas, 2023).

Unlike the European Union's centralized and comprehensive AI regulatory framework, the United States has adopted a sectoral and decentralized approach to AI governance. Rather than imposing overarching AI-specific legislation, the U.S. regulatory model relies on existing legal frameworks, industry self-regulation, and sector-specific guidelines to address AI-related challenges. This approach is rooted in the American legal and economic philosophy of market-driven innovation, which prioritizes technological advancement and economic growth over broad regulatory constraints (Calo, 2017). However, the absence of a unified federal AI law has raised concerns about regulatory fragmentation, enforcement gaps, and ethical risks in AI-powered markets.

One of the defining features of the U.S. AI regulatory approach is its reliance on industry-specific regulations. Various federal agencies oversee AI-related risks within their respective domains, leading to a patchwork of regulations that vary across sectors:

- The Federal Trade Commission (FTC) enforces AI-related consumer protection and competition laws, particularly in digital markets and data privacy. The FTC has warned against AI-driven deception, bias, and anti-competitive practices, emphasizing the need for algorithmic transparency and fairness (FTC, 2021).
- The Securities and Exchange Commission (SEC) regulates AI in financial markets, particularly in algorithmic trading and robo-advisors. AI-driven investment models are subject to SEC oversight to prevent market manipulation, insider trading, and systemic risks (Aldasoro et al., 2024).
- The Food and Drug Administration (FDA) oversees AI in healthcare, ensuring that AI-driven medical technologies meet safety, efficacy, and ethical standards before deployment in clinical settings (FDA, 2021).

**Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy**

• The National Highway Traffic Safety Administration (NHTSA) regulates AI in autonomous vehicles, focusing on liability, safety standards, and accident accountability (NHTSA, 2022).

This decentralized model allows flexibility and sector-specific expertise but also creates inconsistencies in AI governance. Unlike the EU’s AI Act, which establishes a unified compliance structure, the U.S. approach requires companies to navigate multiple regulatory bodies, increasing legal uncertainty. Critics argue that this fragmentation may lead to regulatory arbitrage, where firms exploit gaps between agencies to evade stricter oversight (Denvir et al, 2019).

A key legal challenge in the U.S. AI regulatory landscape is the lack of federal AI legislation. While several states have enacted AI-related laws such as Illinois’ Biometric Information Privacy Act (BIPA) and California’s Consumer Privacy Act (CCPA) there is no comprehensive national framework governing AI ethics, liability, or consumer protection. The Algorithmic Accountability Act, introduced in Congress in 2019 and 2022, sought to require companies to conduct AI impact assessments to mitigate risks of bias, discrimination, and consumer harm. However, legislative progress has been slow due to political divisions and lobbying by technology firms (Pasquale, 2020).

Despite the absence of AI-specific laws, existing federal regulations are being adapted to address AI-related risks. The Civil Rights Act and Equal Credit Opportunity Act are increasingly invoked to regulate AI-driven discrimination in hiring, lending, and criminal justice. The Antitrust Division of the Department of Justice (DOJ) has begun investigating AI-powered algorithmic collusion in pricing models, signaling a growing regulatory focus on competition law and AI-driven market power (Khan, 2019).

The AI Bill of Rights (2024) represents an important step toward a more structured AI governance approach. This policy framework outlines five key principles:

- Safe and effective AI systems;
- Algorithmic discrimination protections;
- Data privacy and control;
- Transparency and explainability;
- Human alternatives and fallbacks.

While the AI Bill of Rights provides guiding principles, it lacks binding legal enforcement, relying instead on voluntary compliance and agency-level oversight (Amarikwa, 2024). This reflects a broader trend in U.S. AI governance, where self-regulation and corporate accountability play a central role.

**Table 2: Comparison with the EU Approach**

Feature	United States (Sectoral Approach)	European Union (AI Act)
Regulatory structure	Decentralized, sector-specific	Centralized, risk-based framework
Main regulatory bodies	FTC, SEC, FDA, NHTSA, DOJ	European Commission, AI regulatory agencies
AI liability rules	Case-by-case enforcement	Strict liability for high-risk AI
Transparency requirements	Industry self-regulation	Mandatory AI documentation
Legal enforcement	No federal AI law, voluntary compliance	Binding EU-wide legislation

Source: Own work based on research methodology

The United States' sectoral approach has advantages in fostering AI-driven innovation, particularly in finance, healthcare, and autonomous systems. However, its lack of a unified AI framework creates legal uncertainties, weak enforcement mechanisms, and potential risks of biased and unregulated AI deployment. As global AI markets evolve, pressure is mounting for the U.S. to adopt a more cohesive AI regulatory strategy that balances market flexibility with ethical and legal safeguards.

China's AI governance model is characterized by three key pillars: centralized government oversight, industry-driven compliance, and national security considerations. These elements are reflected in the country's legal framework, regulatory enforcement mechanisms, and long-term AI policy goals. The New Generation Artificial Intelligence Development Plan (AIDP), launched in 2017, sets ambitious objectives for China to become the world leader in AI by 2030. To achieve this, the government has introduced a series of laws and policies that balance economic incentives, strict regulatory oversight, and state control over data and digital infrastructure (Roberts et al., 2021).

Unlike the EU's AI Act, which primarily focuses on risk-based regulation, or the U.S. approach, which relies on sectoral laws, China regulates AI through a combination of government policies, administrative measures, and direct industry oversight. Some of the most significant regulatory initiatives include:

- The Personal Information Protection Law (PIPL). China's equivalent to the EU's GDPR, imposing strict data governance rules, but with a key difference. The Chinese government retains broad access to private data for national security and economic planning purposes (Tan et al., 2021).
- The Data Security Law (DSL). Establishes a hierarchical classification system for data, prioritizing government control over critical data, including AI-related datasets. Companies must store key data domestically and comply with stringent security protocols (Hu, 2024).
- The Algorithmic recommendation regulations require AI platforms to ensure algorithmic transparency and fairness, prohibiting recommendation systems from promoting content that disrupts social order. This regulation directly affects platforms such as TikTok and WeChat, reinforcing government control over digital media (Abiri & Huang, 2022).
- Deep synthesis and deepfake regulations are some of the first laws globally to regulate AI-generated content, mandating watermarking, identity verification, and government approval for AI-generated media (Broinowski et al., 2024).

These laws reflect China's dual approach to AI governance promoting AI-driven economic growth while ensuring strict government oversight and ideological alignment. Unlike Western regulatory models, which emphasize individual rights and market competition, China's AI laws prioritize social stability, state security, and economic centralization (Roberts et al., 2021).

China's AI regulation is closely linked to its industrial policy, where the government plays a proactive role in supporting domestic AI firms while regulating private sector influence. The State Council and the Cyberspace Administration of China (CAC) oversee AI development, ensuring that companies like Alibaba, Tencent, and Baidu align with national strategic goals.

However, the government has also taken steps to curb the power of large AI-driven tech companies. In 2020-2021, China launched a sweeping antitrust crackdown on AI-powered digital platforms, including Alibaba and Meituan, imposing heavy fines and stricter regulations to prevent monopolistic behavior (Zhang, 2024). Unlike the U.S.,

## Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy

where tech companies wield significant influence over AI policy, China's regulatory model ensures that the state retains ultimate control over AI markets.

A key distinction of China's AI regulatory framework is its deep integration into national security and surveillance infrastructure. AI is widely used in facial recognition, predictive policing, and social credit systems, raising concerns about human rights implications (Cheng et al, 2023).

The Social Credit System, powered by AI and big data analytics, exemplifies how AI is used for both economic governance and social control. By monitoring businesses and individuals, the system enforces compliance with legal and ethical norms, rewarding good behavior and penalizing violations (Kostka, 2019). AI-driven surveillance also plays a crucial role in China's domestic security strategy, particularly in Xinjiang, where facial recognition and predictive analytics have been used for population monitoring, drawing international criticism (Daly, 2019).

**Table 3: Comparison with the U.S and EU Approach**

Feature	China (State-Driven Approach)	United States (Sectoral Approach)	European Union (Risk-Based Model)
<b>Regulatory philosophy</b>	Centralized state control over AI	Market-driven, sectoral laws	Rights-based, risk-based regulation
<b>AI liability rules</b>	State oversight, corporate compliance	Case-by-case enforcement	Strict liability for high-risk AI
<b>Competition law</b>	Government-enforced restrictions on tech monopolies	Industry self-regulation, DOJ oversight	Antitrust rules for AI pricing algorithms
<b>Data privacy &amp; AI</b>	Government retains access to private data	Patchwork of state-level laws	GDPR-style consumer rights
<b>AI and national security</b>	AI integrated into surveillance and state governance	AI in defense, but with private sector control	Ethical AI focus, strict human rights safeguards

Source: Own work based on research methodology

China's AI regulation is unique in its combination of industrial policy, digital governance, and state security concerns. While the U.S. focuses on market-led innovation and the EU on human rights and transparency, China's model ensures that AI serves the strategic interests of the state.

China's AI governance model is shaping international regulatory debates, particularly in countries with state-controlled digital economies. Some nations have adopted elements of China's AI laws, particularly in data localization, AI-driven surveillance, and algorithmic content control (Cheng et al., 2023). However, this model has also raised concerns about the globalization of digital authoritarianism, with critics arguing that China's AI laws set a precedent for state intervention in AI markets at the expense of personal freedoms.

At the same time, China's leadership in AI infrastructure development particularly through the Belt and Road Initiative (BRI) is exporting its AI governance model to developing countries, influencing regulatory trends beyond its borders. This growing regulatory divergence between China, the U.S., and the EU raises critical questions about whether global AI regulation can be harmonized or whether competing AI governance models will fragment digital markets along geopolitical lines.

### **5. Balancing AI regulation, innovation, and market integrity**

The regulation of artificial intelligence in economic markets is at a crossroads. As AI-driven markets continue to evolve, governments and policymakers face the challenge of crafting legal frameworks that balance innovation, ethical governance, and economic stability. Over-regulation risks stifling technological advancements and slowing AI-driven progress, while under-regulation could lead to market distortions, unfair competition, and ethical concerns. Achieving an equilibrium requires a strategic approach that considers both legal adaptability and economic dynamism.

The influence of AI extends beyond economic markets, increasingly impacting judicial and regulatory decision-making. As AI-driven algorithms assist in legal analysis, case predictions, and even sentencing recommendations, concerns arise regarding transparency, accountability, and potential biases embedded in AI models. According to Spulbar and Mitrache (2024), the assessment of AI's role in court decisions presents both opportunities for efficiency and challenges in ensuring fairness and due process. They highlight the urgent need for legal frameworks that establish clear guidelines on AI-assisted judicial reasoning, preventing automated systems from undermining fundamental legal principles such as human oversight, fairness, and proportionality. These concerns mirror broader regulatory debates on AI's role in governance, competition law, and economic decision-making, emphasizing the necessity of comprehensive oversight mechanisms to prevent systemic distortions.

A key aspect of this balance is legal flexibility. AI is a constantly evolving technology, and static regulations may quickly become obsolete. Regulatory frameworks should be adaptive, allowing for periodic reassessment and revision in response to technological advancements. A model that incorporates regulatory sandboxes controlled environments where AI technologies can be tested under temporary legal exemptions could enable innovation while providing regulators with empirical data on AI's real-world implications. Such an approach would help ensure that AI regulations remain relevant and effective without hindering progress.

Harmonization of AI regulations across different jurisdictions is another essential factor. The current global landscape is fragmented, with the European Union, the United States, and China each adopting distinct regulatory philosophies. While these models reflect different political, economic, and cultural priorities, excessive divergence in legal frameworks may lead to regulatory conflicts, compliance burdens for multinational businesses, and barriers to global AI trade. International cooperation through standardized AI ethics guidelines, interoperability requirements, and cross-border compliance mechanisms could facilitate a more cohesive global AI governance structure.

AI-powered models are increasingly used to enhance managerial efficiency, automate compliance, and support strategic corporate decisions, raising important legal and ethical considerations. According to Mitrache et al. (2024), AI-driven corporate governance creates a synergistic link between corporate management and intrapreneurship, where organizations leverage AI to streamline operations, foster innovation, and maintain competitive advantages. However, they caution that without proper regulatory oversight, AI's role in corporate strategy could lead to unintended market consequences, governance loopholes, and ethical dilemmas. This highlights the need for adaptive legal frameworks that ensure AI-powered corporate governance aligns with market integrity, transparency, and fair competition.

Beyond legal mechanisms, industry self-regulation and corporate accountability will play a critical role in shaping the future of AI-powered markets. Companies developing

## **Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy**

and deploying AI systems should adopt transparent governance policies, robust risk assessment frameworks, and proactive ethical AI principles. Voluntary compliance with AI ethics charters and fair competition commitments can mitigate the need for overly stringent regulations. Moreover, integrating AI ethics committees within corporations could ensure that AI deployment aligns with societal and economic interests rather than merely focusing on profitability.

AI-driven economies also require consumer and business education. The general public, as well as businesses leveraging AI, must have a clear understanding of how AI systems function, their potential risks, and their impact on privacy, competition, and employment. Regulatory bodies should collaborate with academic institutions, civil society, and industry stakeholders to develop awareness campaigns, training programs, and public consultations that foster informed decision-making in AI adoption.

Looking ahead, the next phase of AI regulation will depend on technological advancements, policy evolution, and market adaptations. The regulatory landscape should be dynamic and capable of addressing emerging challenges such as AGI (Artificial General Intelligence), AI-human collaboration, and quantum-enhanced AI systems. Future regulatory discussions must also address AI's environmental impact, workforce displacement due to automation, and ethical concerns surrounding AI-human interactions.

### **6. Conclusions**

Artificial intelligence is no longer a futuristic concept it is a reality shaping economic markets, influencing decision-making, and redefining the regulatory landscape. The challenge before us is clear: How do we govern an evolving technology without suffocating its potential? How do we ensure that AI-driven economies remain fair, competitive, and ethically sound, rather than tools of monopolistic power or instruments of unchecked surveillance?

Throughout this discussion, we have seen the legal complexities and economic opportunities that AI presents. The European Union has taken a structured and rights-based approach, the United States has leaned on sectoral governance and self-regulation, while China has integrated AI into its national strategy with strict government oversight. But in a world increasingly interconnected by AI-powered markets, can these competing models coexist, or will they lead to regulatory fragmentation that stifles cross-border AI collaboration?

Liability, bias, data privacy, and market fairness remain at the heart of AI regulation, but one fundamental issue persists: Can regulation keep pace with the rapid evolution of AI? Laws and policies are reactive by nature, while AI continues to evolve at an unprecedented rate. Will regulatory sandboxes, ethical AI principles, and adaptive legal mechanisms be enough to prevent AI-driven markets from spiraling into legal and economic uncertainty? Or will we find ourselves permanently chasing a technology that refuses to be contained?

Yet, AI regulation is not just a legal or economic issue it is a societal one. AI is not inherently ethical or unethical, fair or unfair it reflects the values and priorities of those who create and deploy it. So the ultimate question remains: What kind of AI-powered world do we want to build? One where technology serves only the most powerful, or one where it is harnessed for collective economic prosperity and human advancement?

The answers to these questions will define the next era of AI governance. While there may never be a perfect balance between innovation and regulation, the ongoing debate is a sign that we are asking the right questions. AI-driven markets are still in their infancy,

and the decisions we make today will determine whether AI becomes a force for economic progress or a catalyst for digital inequality.

As we look ahead, the conversation must continue. AI is not waiting for regulators, policymakers, or businesses to catch up, it is moving forward with or without them. The real question is: Will we shape AI, or will AI shape us?

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The authors contributed equally to this work.

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#### Article Info

*Received:* March 24 2025

*Accepted:* May 22 2025

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#### How to cite this article:

Spulbar, L. F. (2025). Legal frameworks for AI-driven markets and their challenges and opportunities in the digital economy. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 288 – 304.



## ORIGINAL PAPER

# Workaholism A Bibliometric Analysis of Trends and Research Impact

Otilia Maria Trasca<sup>1)</sup>

### Abstract:

Workaholism, a prevalent yet underappreciated phenomenon of modern working life, has become ever more exposed to academic attention owing to its far-reaching consequences for employee well-being, organizational performance, and general socio-economic systems. This paper performs an exhaustive bibliometric review of workaholism research, charting its intellectual development and uncovering the prominent thematic clusters, productive authors, and conspicuous publication patterns between 2000 and 2025. Using Web of Science data, we analyze citation networks, co-authorship, and keyword trends to chart the scholarly terrain of workaholism research.

The study demonstrates a significant body of productivity in the shape of research, particularly in the last ten years, reflecting accelerating concerns regarding burnout, mental health, work-life balance, and productivity in hyper-connected working conditions. Predominant research issues are the psychological foundation of workaholism, its relationships with job stress and satisfaction, and detrimental effects on physical and mental health outcomes. Technological change, remote work, and the gig economy have relocated the debate so that it has put even greater focus on the intersection of workaholism and digital connectivity, organizational culture, and socio-cultural forces.

We place workaholism in this research not only as an individual psychological inclination but as a complex work issue that demands organizational and policy-level systematic interventions. By mapping the developments in the area, we offer implications for future research, especially on AI-supported work cultures, digital work addiction, corporate interventions, and support systems for facilitating sustainable work habits.

**JEL:** J22, J28, M54

**Keywords:** *Workaholism, Organizational Behavior, Burnout, Mental Health, Employee Well-being.*

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## Introduction

The phenomenon of workaholism, despite its increasing recognition in the scholarly literature, remains insufficiently understood in terms of its multidimensional nature and its implications for individuals, organizations, and society at large. Initially conceptualized as a compulsive tendency to work excessively without clear extrinsic motivation (Oates, 1971), workaholism has since been reconceptualized in a more sophisticated manner, incorporating cognitive, behavioral, and affective dimensions of a dysfunctional relationship with work (Schaufeli, Taris & Bakker, 2008). Over time, research has evolved from a psychopathological understanding of the phenomenon to a broader approach that also includes the analysis of organizational, cultural, and technological factors contributing to its development and persistence (Leiter et al., 2014; Judijanto, 2024).

In recent literature, workaholism is frequently examined in relation to closely related but distinct concepts such as burnout, work engagement, and job involvement. This has led to both important conceptual advances and theoretical confusion (Bakker et al., 2011; Clark, Michel, Zhdanova, Pui & Baltes, 2016). Accordingly, a significant research stream focuses on differentiating between healthy engagement and compulsive work involvement, with an emphasis on the effects of these orientations on well-being and professional performance. Aziz and Covington (2024) highlight that the level of affective commitment and the structure of self-concept can mediate the relationships between workaholism and occupational outcomes, drawing attention to the identity dimension of work in the modern era.

Empirical data also indicate a strong correlation between workaholism and burnout, as well as other negative consequences such as emotional exhaustion, deterioration of personal relationships, occupational stress, and decreased job satisfaction (Leiter et al., 2014; Taris, van Beek & Schaufeli, 2010). At the same time, pressures generated by hyper-productivity culture, the expansion of the digital economy, and the flexibilization of work arrangements (remote work, gig economy) further exacerbate overwork tendencies, increasing risks to employees' mental health (Erliana et al., 2023; Judijanto, 2024).

In recent years, bibliometric analysis has become an essential tool for understanding the evolution of a scientific field, offering valuable insights into author networks, influential journals, dominant themes, and emerging trends. Existing bibliometric studies in the field of occupational health and employee well-being highlight a significant rise in research on workaholism beginning in the second decade of the 21st century, in parallel with crises triggered by the COVID-19 pandemic and the accelerated transformations of the work environment (Erliana et al., 2023; Judijanto, 2024; Van Wijhe, Peeters, & Schaufeli, 2011).

In this context, the present study aims to conduct a comprehensive bibliometric analysis of the scientific literature on workaholism, published between 2000 and 2025, with the goal of mapping the intellectual development of the field, identifying prolific authors, influential sources, and dominant thematic clusters, as well as highlighting emerging research directions. Using the Web of Science database and R Bibliometrix tools, this study systematically maps the knowledge structure on workaholism amid the growing redefinition of work and its boundaries.

# Workaholism A Bibliometric Analysis of Trends and Research Impact

## Bibliometric Methodology and Data Processing

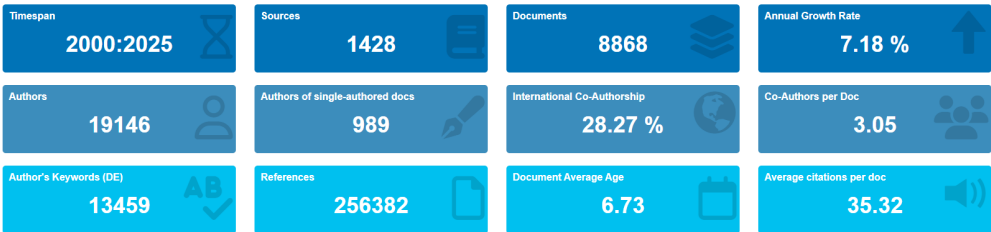
This research employs a bibliometric analysis to investigate the evolution of trends and research directions associated with workaholism and related concepts in the scientific literature within the fields of business, management, and economics. The primary objective of the analysis is to highlight publication dynamics, academic collaborations, thematic distribution, and the scholarly impact of relevant works that contribute to a deeper understanding of workaholism as an organizational and psychosocial phenomenon.

The data were extracted from the Web of Science Core Collection, regarded as one of the most prestigious and rigorous international bibliographic databases. The search was conducted using the following key terms: *workaholism*, *work addiction*, *compulsive working*, *work engagement*, *burnout*, *occupational stress*, *work-life balance*, and *psychological wellbeing*. These terms were searched within the title, abstract, and keyword fields of the articles. To ensure the relevance of the results, disciplinary filters were applied, including only publications indexed under the categories of Business, Management, and Economics.

The time frame considered spans from the year 2000 to 2025, yielding a total of 8,868 documents published across 1,428 scientific sources, with an average annual publication growth rate of 7.18%. The final dataset includes contributions from 19,146 authors, of whom 989 have published single-authored articles. The degree of international collaboration is substantial, with 28.27% of the articles co-authored internationally, and an average of 3.05 co-authors per document. Regarding scientific impact, the selected articles have an average of 35.32 citations per document, and the average document age is 6.73 years, indicating a balance between historical relevance and the currency of sources. In total, 13,459 author keywords and 256,382 bibliographic references were identified.

The bibliometric analysis was conducted using the R Bibliometrix package and its visual interface, Biblioshiny, which provides tools for exploring collaboration networks, co-citation patterns, keyword frequency, and other relevant bibliometric indicators. The results obtained allow for a detailed understanding of the scientific landscape concerning workaholism and related phenomena, facilitating the identification of key research trends, influential authors, high-impact journals, and emerging thematic areas.

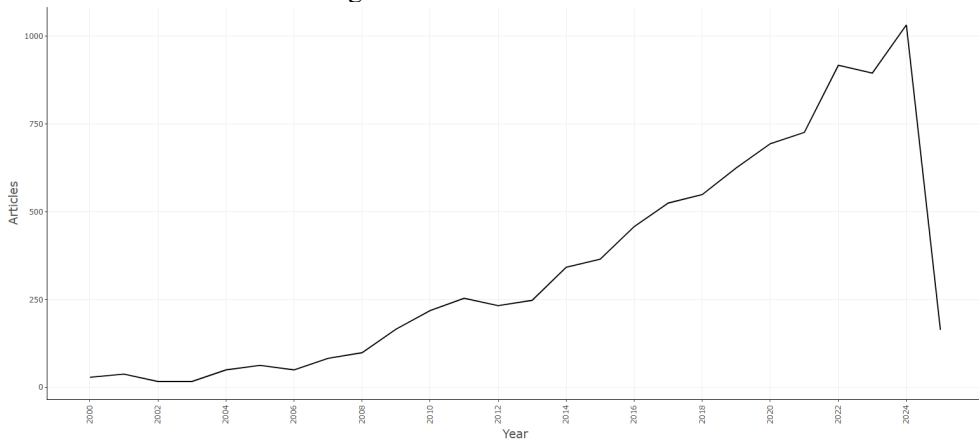
Figure 1. Data base summary



Source: Authors' own processing using the Biblioshiny application

## Results

Figure 2. Annual Scientific Production



Source: Authors' own processing using the Biblioshiny application

The annual scientific production clearly reflects the dynamic evolution of academic interest in workaholism as an individual, organizational, and societal phenomenon. During the period 2000–2007, interest in the topic remained relatively marginal, with a low number of publications per year. This supports the notion that workaholism was predominantly perceived as an individual psychological trait, rather than a matter of collective or institutional concern.

Following 2008, a progressive increase in the volume of publications becomes evident, with a notable surge beginning in 2014. This coincides with the rise of global discourse surrounding mental health in the workplace, burnout syndrome, and hyper-productivity culture. Such a trend is consistent with the hypothesis outlined in the abstract concerning “accelerating concerns regarding burnout, mental health, work-life balance, and productivity.”

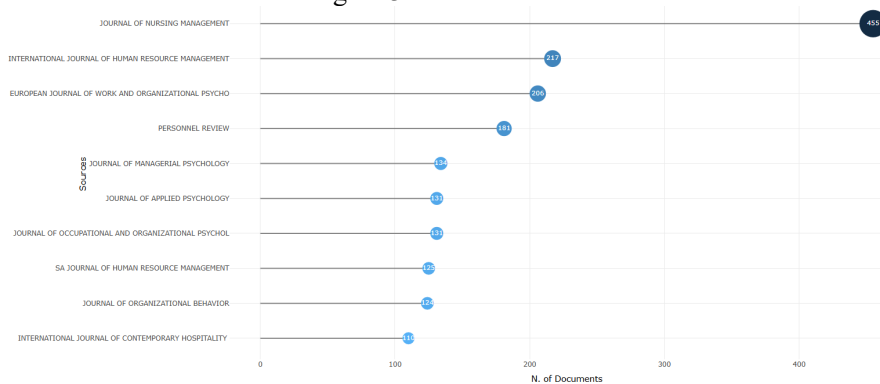
The peak of academic production is reached in 2023, suggesting a culmination of scientific interest in a post-pandemic context. In this period, the reorganization of work (including remote work, gig economy models, and technology-assisted labor) generated new sources of stress and redefined relationships with working time, professional spaces, and the boundaries between work and personal life. These changes have brought to the forefront emerging themes such as digital work addiction, remote overworking, and tech-enabled burnout—topics identified in the abstract as current and future research directions.

The sharp decline observed in 2025 does not reflect an actual decrease, but is instead attributable to the fact that the year is still ongoing and many articles have yet to be indexed in the Web of Science database.

The upward trend and consolidation of publication volume in the past decade support the idea that workaholism has conceptually evolved from a mere individual trait to a systemic work-related issue, with profound psychological, organizational, and social implications—thus requiring interventions at the level of institutional policies and organizational culture.

## Workaholism A Bibliometric Analysis of Trends and Research Impact

Figure 3. Most Relevant Sources



Source: Authors' own processing using the Biblioshiny application

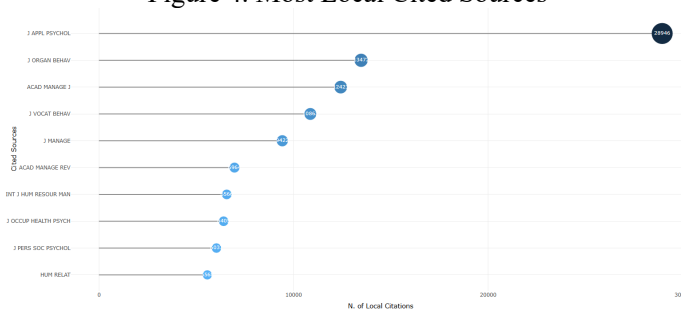
The analysis of the most relevant sources reveals a significant concentration of research on workaholism and related phenomena within fields such as human resource management, organizational psychology, and professional behavior. According to the data obtained, the journal with the highest number of publications is the *Journal of Nursing Management*, with 455 articles. This suggests a particular interest in this topic within the healthcare sector, known for its high levels of occupational stress and professional overload. This positioning reflects the interdisciplinary nature of workaholism, which extends beyond the traditional corporate sphere into high-risk burnout domains.

Following closely are the *International Journal of Human Resource Management* (217 articles) and the *European Journal of Work and Organizational Psychology* (206 articles), both journals being renowned for publishing cutting-edge research on employee attitudes, organizational behavior, and work–life balance. The presence of these journals at the top validates the notion that workaholism is addressed not only as an individual construct but also as an outcome of organizational policies and institutional culture.

Other journals with prolific activity in this field include *Personnel Review*, *Journal of Managerial Psychology*, *Journal of Applied Psychology*, and *Journal of Occupational and Organizational Psychology*—all of which reflect a psychological and behavioral approach to excessive work. This distribution confirms a dual orientation in the research: on one hand, toward the motivations and individual traits associated with workaholism; on the other hand, toward the working conditions, leadership styles, and professional environments that foster or inhibit such behaviors.

Additionally, the presence of the *International Journal of Contemporary Hospitality Management* and the *SA Journal of Human Resource Management* indicates a growing focus on industries characterized by high operational pressures and irregular working hours, such as tourism, hospitality, and the service sector.

Figure 4. Most Local Cited Sources



Source: Authors' own processing using the Biblioshiny application

The chart highlights the leading academic sources that have shaped and sustained the scientific discourse on workaholism during the period 2000–2025. At the top of the list is the *Journal of Applied Psychology*, with a total of 28,946 local citations, clearly confirming its central role in building the theoretical framework of workaholism-related studies. This journal is renowned for publishing foundational work in work psychology, motivation, occupational stress, and performance—dimensions closely related to the phenomenon of workaholism.

Following closely are the *Journal of Organizational Behavior* (13,472 citations) and the *Academy of Management Journal* (12,423 citations), signaling the firm integration of this topic into the literature on organizational management and employee behavior. The prominence of these journals underscores the interdisciplinary and contextual nature of workaholism, which is treated not only as an individual psychological phenomenon but also as an outcome of organizational structure, leadership, and institutional culture.

In addition, sources such as the *Journal of Vocational Behavior* and the *Journal of Management* suggest an approach focused on career development, professional commitment, and organizational strategy—indicating that workaholism is frequently analyzed in relation to career path decisions and organizational expectations.

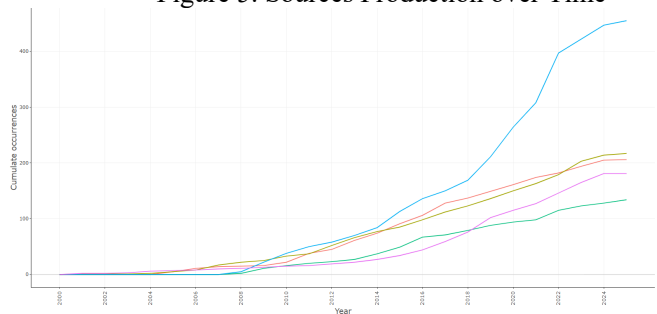
The importance of journals like the *Academy of Management Review*, the *International Journal of Human Resource Management*, and *Human Relations* confirms that the literature on workaholism is strongly grounded in conceptual contributions from strategic management, HR practices, and interpersonal relations within professional environments.

The presence of journals such as the *Journal of Occupational Health Psychology* and the *Journal of Personality and Social Psychology* further underscores the growing emphasis on the psychosocial and health-related consequences of compulsive work behavior. This reinforces the idea that workaholism is a boundary-spanning construct between high performance and dysfunction.

The profile of the most frequently cited sources supports the thesis stated in the abstract: workaholism is a complex and multidimensional issue located at the intersection of applied psychology, organizational behavior, and human resource policy.

# Workaholism A Bibliometric Analysis of Trends and Research Impact

Figure 5. Sources Production over Time



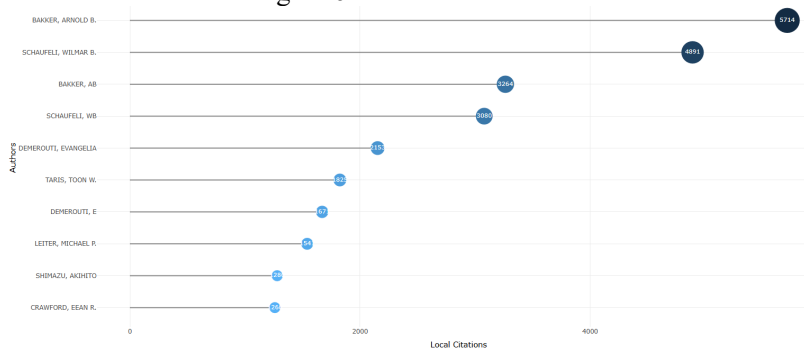
Source: Authors' own processing using the Biblioshiny application

The chart illustrates the cumulative contribution of the most active scientific journals to research on workaholism over the period 2000–2025. A gradual diversification of publications is observed, with an accelerated increase beginning around 2010, confirming and reinforcing earlier observations regarding the field's upward trajectory.

The most pronounced trend line belongs to one journal (likely the *Journal of Nursing Management* or *Journal of Applied Psychology*, based on previous charts), which shows steady yet significantly accelerated growth starting in 2016, culminating in over 450 cumulative publications by 2025. This trajectory suggests sustained engagement with the scholarly debate on the psychosocial implications of work and on occupational health—key domains for understanding workaholism in high-pressure, burnout-prone environments.

Other top-producing journals—particularly those in the fields of organizational behavior, HR management, and applied psychology—also display consistent upward trends, indicating a persistent interdisciplinary interest in the topic of workaholism. Their parallel and converging trajectories after 2014 suggest a maturing of the field, with a consolidated approach from psychological, managerial, and socio-organizational perspectives.

Figure 6. Most Local Cited Authors



Source: Authors' own processing using the Biblioshiny application

The chart highlights the authors with the greatest local impact in the literature dedicated to workaholism, based on the total number of citations received within the

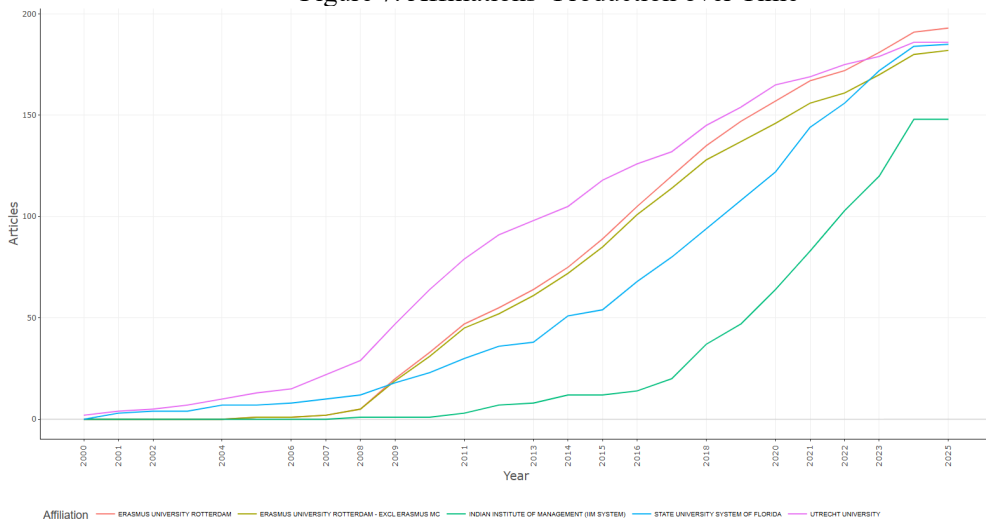
analyzed database. These scholars represent the epistemic core of the field, and their work has played a pivotal role in shaping theory, measurement tools, and research directions.

The most cited author is Arnold B. Bakker, with 5,714 local citations, followed by Wilmar B. Schaufeli, with 4,891 citations, along with alternate reference variants of the same authors (e.g., *Bakker, AB* – 3,264; *Schaufeli, WB* – 3,080). This redundancy reflects citation style variations but reinforces the idea that these two researchers are the leading figures in the field. Their work is frequently associated with the development of the Job Demands–Resources (JD-R) model and with foundational concepts such as *work engagement*, *burnout*, and *workaholism*, treated as interrelated phenomena.

Another prominent name is Evangelia Demerouti, with over 2,153 local citations, who collaborated closely with Bakker in the development of the JD-R model and in conceptualizing occupational stress as an imbalance between job demands and available resources. The consistent presence of these authors at the top of the citation rankings validates the dominant direction of research, which focuses on the interaction between organizational environments, employee traits, and the psychosocial consequences of intensive work.

Also appearing are scholars such as Toon Taris, involved in longitudinal research on workaholism, and Michael P. Leiter, known for his studies on burnout and dysfunctional workplace relationships. The presence of Japanese author Akihito Shimazu also suggests a broad international interest in the field, particularly in the context of norm-driven work cultures (e.g., Japan), where workaholism is perceived as a deeply rooted social reality.

Figure 7. Affiliations' Production over Time



Source: Authors' own processing using the Biblioshiny application

The chart illustrates the evolution of cumulative scientific output from 2000 to 2025 for the most active academic institutions involved in research on workaholism and related topics. The data reflect a progressive consolidation of institutional contributions to this interdisciplinary field, with accelerated growth rates beginning in 2010, particularly among European and North American universities.

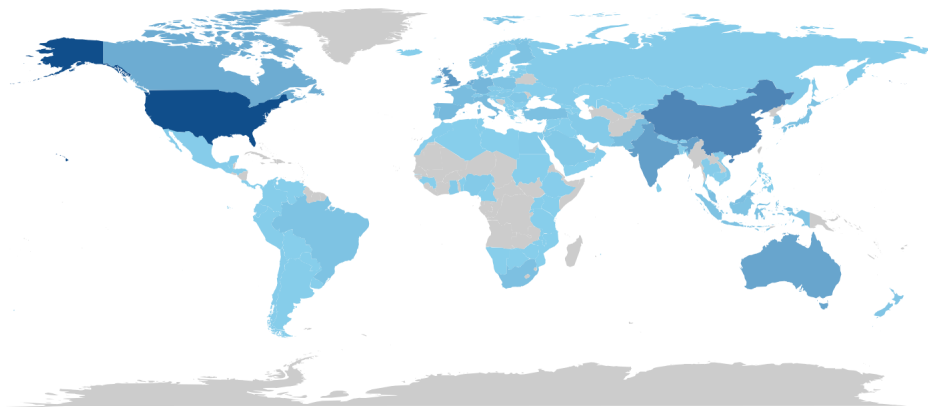
## Workaholism A Bibliometric Analysis of Trends and Research Impact

Utrecht University (purple line) stands out through a consistent and dominant presence throughout the analyzed period, reaching nearly 200 articles by 2025. This trajectory confirms the institution's role as a leading academic center in the study of *work engagement* and *workaholism*, closely associated with prominent scholars such as Wilmar Schaufeli and Arnold B. Bakker. Furthermore, the proximity of the lines representing Erasmus University Rotterdam (red and yellow—general and non-Erasmus MC versions) to Utrecht's trajectory indicates the formation of a Dutch nucleus of excellence in this area, maintaining long-term relevance and productivity.

In parallel, the State University System of Florida (blue line) shows steady growth, especially after 2014, reflecting increasing involvement in international research on occupational mental health and the psychosocial effects of intense work. The Indian Institute of Management (IIM System) (green line) has exhibited rapid, nearly exponential growth since 2018, with a notable surge after 2020, reaching over 140 publications by 2025. This dynamic suggests a recent and intensified mobilization of the South Asian academic sector in workaholism research, likely driven by the pandemic context, accelerated digitalization, and structural transformations of labor in emerging economies.

The parallel and converging trajectories of these five major institutions highlight not only the global rise in interest toward this phenomenon but also a gradually more balanced geographical distribution of expertise.

Figure 8. Country Scientific Production



Source: Authors' own processing using the Biblioshiny application

The map illustrates the scientific contributions by country in the field of workaholism research during the period 2000–2025. The intensity of color reflects the total volume of publications, and the results indicate broad geographical coverage, with a strong emphasis on academically and economically developed regions.

As expected, the United States clearly dominates scientific production, standing as the global leader in the number of publications. This position can be attributed to the large number of universities and research centers, as well as the growing interest in the psychosocial impact of excessive work within a hyper-productive and digitized economy.

Significant contributions also come from Western Europe—particularly the United Kingdom, the Netherlands, Germany, and the Nordic countries—confirming their roles as conceptual and methodological leaders in the study of work psychology and organizational behavior. This trend aligns with the prominent presence of authors such as

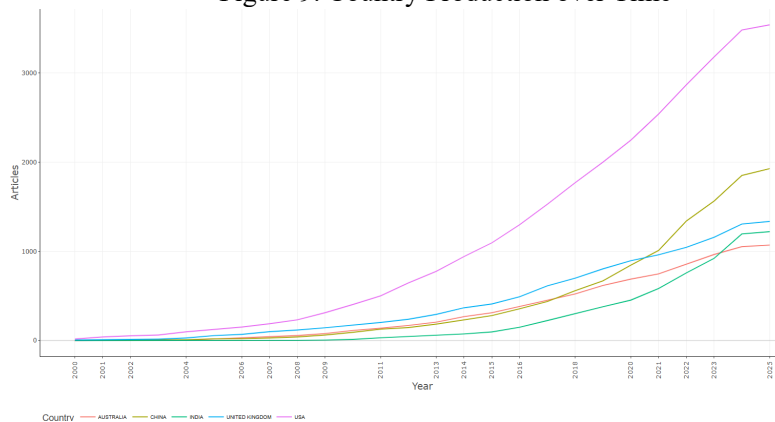
*Schaufeli and Bakker*, and with the influence of Dutch institutions highlighted in earlier charts.

In Asia, countries like China, South Korea, and Japan stand out through intensive scientific activity, consistent with the cultural specificity of the region, where collectivist values and a rigorous work ethic may foster tendencies toward workaholism. This engagement reflects growing concern with the psychological imbalances generated by performance pressures in the modern workplace.

Notable contributions also come from Australia, Canada, and several Latin American countries (e.g., Brazil, Mexico), indicating a global expansion of interest in workaholism, including in diverse economic and cultural contexts.

However, the map also reveals underrepresented geographic areas, particularly Sub-Saharan Africa, Central Asia, and parts of the Middle East, which may reflect limited access to academic infrastructure, a lower prioritization of the topic, or underreporting of the phenomenon due to cultural or institutional factors.

Figure 9. Country Production over Time



Source: Authors' own processing using the Biblioshiny application

The chart illustrates the evolution of scientific output from the most active countries in workaholism research during the period 2000–2025. Significant differences can be observed between nations, both in terms of the initial timing of academic engagement with the topic and in the pace and scale of growth in scientific article production.

The United States (purple line) stands out clearly from all other countries, reaching a cumulative volume of over 3,500 publications by 2025. The growth is steady and increasingly rapid, especially after 2012, reflecting the sustained academic interest in occupational health, professional stress, and performance under hyperproductive conditions. This trajectory confirms the U.S.'s role as a conceptual and methodological leader in the field, supported by a well-funded academic ecosystem and a competitive organizational culture.

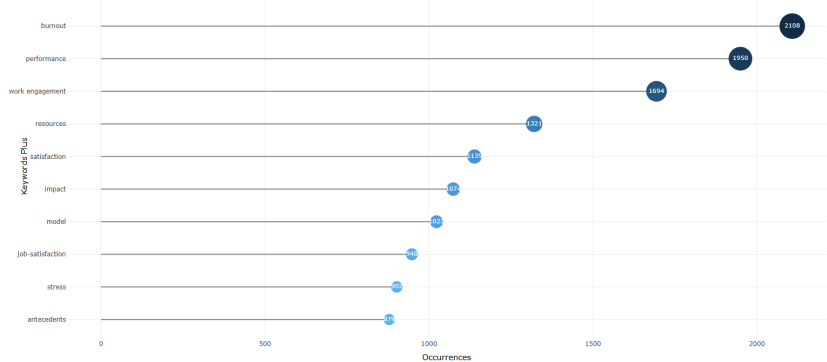
Following the U.S., China (yellow line), the United Kingdom (blue line), and Australia (red line) all show significant growth, particularly from 2015 onwards. China is notable for its accelerated rise over the past five years, surpassing the 2,000-publication threshold, suggesting an intensive mobilization of research efforts—likely in response to growing performance pressures and work culture demands. The United Kingdom

# Workaholism A Bibliometric Analysis of Trends and Research Impact

maintains a steady and stable trajectory, reflecting its strong academic tradition in organizational psychology and employee well-being studies.

India (green line) is the clearest example of an emerging country with a remarkable upward trajectory. After a relatively stable period, India has experienced a significant acceleration in scientific output starting in 2018, surpassing Australia in 2023. This trend reflects the country’s growing academic capacity and its increased interest in the social and psychological consequences of digital transformation and rapid urbanization on the workforce.

Figure 10. Most Frequent Words



Source: Authors’ own processing using the Biblioshiny application

The chart presents the most frequent *Keywords Plus* in the academic literature related to workaholism, offering a clear view of the key concepts and theoretical relationships that structure the field. These terms reflect not only their frequency in the texts but also their level of connectivity within thematic research networks.

The most frequent term is burnout (2,108 occurrences), confirming the complementary and often correlated nature of the two concepts. In a significant portion of the literature, workaholism is examined either as a predictor of burnout or in conceptual opposition to work engagement, especially within the Job Demands–Resources (JD-R) model. This is further supported by the frequent presence of the term work engagement (1,694 mentions), indicating an ongoing concern with distinguishing between healthy involvement in work and compulsive, maladaptive overcommitment.

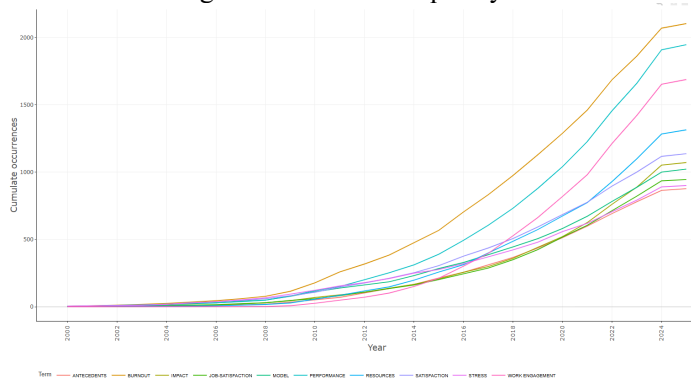
The term performance (1,950 mentions) highlights a major research focus on the impact of workaholism on professional effectiveness. This reflects a common dilemma in the literature: is workaholism a driver of productivity, or a long-term threat to sustainable work?

Other central terms include resources, satisfaction, impact, job satisfaction, stress, and antecedents, which together create a coherent analytical framework:

- Resources suggests the application of the JD-R theory and emphasizes protective factors in occupational health.
- Satisfaction and job satisfaction point to concerns regarding the affective consequences of compulsive work behavior.
- Impact reflects the multidimensional scope of the research, from individual effects to organizational and societal implications.

- Stress and antecedents indicate strong interest in the causal mechanisms of workaholism, often integrated into predictive or explanatory models.

Figure 11. Words' Frequency over Time



Source: Authors' own processing using the Biblioshiny application

The cumulative frequency analysis of key terms used in the specialized literature on workaholism between 2000 and 2025 reveals a complex thematic dynamic and a notable evolution marked by significant shifts in research focus. For a clearer understanding of the conceptual transformations, three distinct periods can be identified: 2000–2010, 2010–2020, and 2020–2024.

In the first period (2000–2010), research on workaholism was still in its early stages, with relatively low frequency of core terms. During this phase, the focus was primarily on fundamental concepts such as *satisfaction*, *stress*, and *job satisfaction*, reflecting an interest in the relationship between excessive work involvement and individual well-being. Terms like *burnout* and *performance* began to appear gradually but had not yet achieved thematic consolidation. The approach remained largely centered on the individual, with limited conceptualization of the organizational or societal implications of the phenomenon.

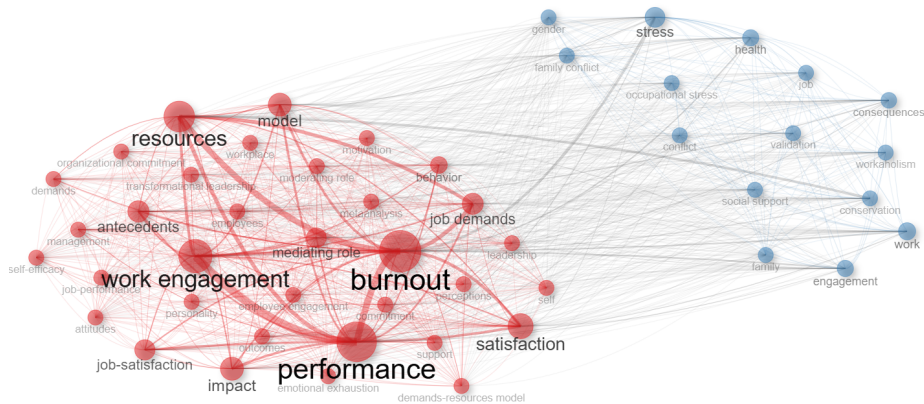
The period 2010–2020 marks a significant expansion of research, both quantitatively and qualitatively. The frequency of terms such as *burnout* and *stress* increased sharply, signaling a growing focus on the negative effects of workaholism on mental health. Notably, there is a marked rise in the use of terms such as *model*, *resources*, and *impact*, suggesting a maturing of the field and a diversification of theoretical and methodological perspectives. During this period, the focus began to shift from an individual-level understanding of the phenomenon to the integration of relevant organizational and contextual variables—such as work culture, work–life balance, and institutional support structures.

The most recent period (2020–2024) is characterized by an unprecedented intensification of research, against the backdrop of major shifts brought on by digitalization, remote work, and global crises such as the COVID-19 pandemic. The term *burnout* becomes dominant, reflecting increasing concern about the negative effects of constant connectivity and digital overload. Simultaneously, terms like *antecedents*, *impact*, *performance*, and *resources* reach record-high frequencies, indicating heightened interest in identifying the structural causes of workaholism and in designing effective organizational interventions. Additionally, increased usage of *work engagement* suggests

## Workaholism A Bibliometric Analysis of Trends and Research Impact

a growing effort to conceptually distinguish between healthy and compulsive forms of work involvement.

Figure 12. Co-occurrence Network



Source: Authors' own processing using the Biblioshiny application

The keyword co-occurrence map highlights two major thematic clusters, clearly delineated both chromatically and conceptually. The red cluster, which is predominant, centers around the terms *burnout*, *performance*, *work engagement*, *resources*, and *antecedents*. This core cluster reflects a clear research orientation toward the organizational and psychological dimensions of work, with emphasis on *demands–resources* theoretical models, the role of contextual and individual antecedents, and the relationship between professional engagement and job performance. The dense interconnections among these terms suggest a mature network, where the concepts are frequently investigated together in an integrated manner.

In contrast, the blue cluster, which is more dispersed, gravitates around terms such as *stress*, *work*, *health*, *conflict*, *workaholism*, and *social support*. This thematic group appears to represent a broader, interdisciplinary approach that includes social and contextual factors such as work–family conflict, social support, and gender differences. The term *workaholism* is included in this cluster but is positioned more peripherally, suggesting that—despite being a key concept—research on it is still often detached from the dominant core of investigations on burnout and engagement.

The layout of the network indicates that terms associated with *burnout*, *job demands*, and *performance* are centrally positioned and densely connected, reflecting the coherence and maturity of this subfield. In contrast, the blue area is more diffuse and fragmented, which may signal either a methodological and thematic diversification in studying workaholism within various social contexts, or a need for further conceptual consolidation in this segment of the literature.

This dual distribution of the network suggests a polarization of research between psychologically driven, individual-centered approaches and those focused on organizational and social dimensions. At the same time, the existing interconnections between the clusters reveal that these directions are not entirely disjointed but rather coexist within an evolving scientific landscape.

## Conclusions

The results of this bibliometric analysis confirm that workaholism has evolved over recent decades from a marginal individual psychological trait to a widely recognized organizational and societal phenomenon with profound implications for employee health, institutional performance, and the balance of socio-economic systems. The exponential growth of academic production, particularly after 2010, reflects the scientific community's increasing concern with understanding and addressing this phenomenon in the context of radical transformations in contemporary work.

The analysis of keywords, co-citation networks, and publication dynamics reveals a thematic consolidation around the concepts of *burnout*, *work engagement*, *performance*, and *resources*, largely anchored in the Job Demands–Resources (JD-R) model. In parallel, the prominence of terms such as *stress*, *job satisfaction*, *antecedents*, and *impact* indicates a diversification of research directions, increasingly focused on the interplay between work characteristics, organizational climate, and psychological well-being. This trend supports the hypothesis put forward in the introduction: workaholism cannot be understood in isolation but only through a systemic approach that takes into account contextual, cultural, and technological factors.

The structure of the co-occurrence network confirms the existence of two major thematic clusters: one focused on organizational dynamics and established theoretical frameworks, and the other on social and relational dimensions. This thematic polarization suggests an opportunity for convergence between micro- and macro-level approaches, bridging work psychology and organizational studies to achieve a more comprehensive understanding of workaholism in the digital age.

Against the backdrop of technological advancement, the rise of remote work, and the expansion of the gig economy, workaholism is taking on new, often invisible forms, driven by hyperconnectivity and performance-obsessed organizational cultures. It thus becomes clear that responses to this phenomenon must go beyond the individual level and extend to organizational policies and systemic interventions designed to foster sustainable work behaviors. This study provides a clear mapping of the field's developments and highlights relevant future research directions, including the impact of artificial intelligence on work culture, emerging forms of digital addiction, the effectiveness of corporate interventions, and the role of organizational support systems.

In conclusion, the study highlights both the conceptual maturation of the literature on workaholism and the need to reframe the research agenda toward a transdisciplinary and applied understanding that aligns with the new realities of contemporary work.

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### Article Info

*Received:* March 26 2025

*Accepted:* May 14 2025

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#### How to cite this article:

Trasca, O. M. (2025). Workaholism A Bibliometric Analysis of Trends and Research Impact. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 305 – 319.



## ORIGINAL PAPER

# Fintech's Productivity Trap: How Digital Finance Fuels Workaholism

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### Abstract:

The rise of fintech has brought about significant innovations in the financial sector, transforming how financial services are delivered and consumed. However, alongside these advancements, a less-discussed phenomenon has emerged: the intensification of workaholism in the fintech industry. This paper explores how the fast-paced, always-on culture inherent in fintech organizations contributes to increased workaholism among employees. Fintech's emphasis on continuous innovation, high competition, and the blurring of work-life boundaries due to digital tools and remote work creates an environment where employees are expected to be constantly productive. The ubiquitous presence of mobile applications, real-time communication, and AI-driven systems perpetuates a culture of "always being available", leading to long working hours and burnout. The paper also examines the psychological and social impacts of this relentless work culture, including stress, mental health issues, and reduced quality of life. The paper highlights how these challenges are exacerbated by the startup mentality and the expectation of rapid growth and success. Finally, the paper discusses potential solutions, such as regulatory measures, corporate responsibility, and shifts in organizational culture, to mitigate workaholism and promote a healthier work-life balance within the fintech sector. As fintech continues to reshape global finance, addressing the issue of workaholism is crucial for ensuring sustainable growth and the well-being of those driving innovation in this dynamic field.

**JEL:** G21, J22, O33

**Keywords:** *Fintech, Workaholism, Productivity, Burnout, Digital Finance.*

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# Fintech's Productivity Trap: How Digital Finance Fuels Workaholism

## Introduction

Over the past two decades, financial technology (fintech) has profoundly reshaped the infrastructure of global financial services, providing faster, cheaper, and more efficient access to financial products and solutions. This digital transformation has massively expanded financial inclusion, with a notable impact in emerging economies, where millions of previously excluded individuals have become part of the formal financial system (Gabor & Brooks, 2017). However, behind this technological progress lies a less discussed but deeply rooted issue: the intensification of workaholism among employees in fintech and related industries.

Fintech organizations operate in an extremely competitive environment that values continuous innovation, execution speed, and constant availability. These characteristics have fostered an “always-on” organizational culture, where high performance expectations and instant responsiveness are mediated by omnipresent digital technologies (Aloulou, 2021). Permanent connectivity and the blurred boundaries between professional and personal space fuel compulsive work behaviors and significantly reduce the capacity for psychological detachment (Monteiro & Joseph, 2023).

Specialized literature indicates a clear correlation between workaholism and mental health decline, including anxiety, insomnia, burnout, and depression (Tahir & Aziz, 2019). This risk is further exacerbated by the fact that in fintech ecosystems, overwork is often perceived not as a dysfunction, but as a sign of commitment to the company's mission or as a potential for rapid scaling (Shobana & Siddiq, 2024).

This paper aims to investigate how the core characteristics of the fintech environment—digital mobility, performance pressure, lack of temporal boundaries, and a hyper-competitive entrepreneurial culture—contribute to the proliferation of workaholism. The article will also explore the psychosocial impact of this phenomenon through the lens of organizational theories and propose remedial measures through organizational policies, public regulations, and a redefinition of success metrics in the fintech domain.

## Defining Key Concepts

The term *fintech* is a shorthand for “financial technology” and refers to the integration of technological innovation into financial services and products, with the aim of improving access, efficiency, and user experience. Fintech encompasses a wide range of services, from mobile payments and peer-to-peer lending to robo-advisory, digital assets, and algorithm- and AI-based lending systems. The fintech ecosystem is characterized by a digital, agile, and customer-centered culture, oriented toward disruption and governed by scalable, data-driven business models (Aloulou, 2021). This culture encourages rapid innovation cycles and constant interconnectivity, which not only transforms how financial services operate, but also reshapes work behaviors within fintech companies.

*Workaholism* is defined as a compulsive and uncontrollable tendency to work excessively and remain preoccupied with work at the expense of other aspects of personal life. It should not be confused with simple professional engagement or passion for work; workaholism is marked by a psychological need to work, often associated with anxiety, detachment difficulties, dissatisfaction, and ultimately, mental and physical health problems (Tahir & Aziz, 2019). Spence and Robbins (1992) identified three dimensions

of workaholism: “work involvement,” “compulsive drive,” and “work enjoyment,” suggesting that only the first two are linked to negative health outcomes.

An emerging concept tied to digital transformation is that of *digital hyperproductivity*—the idea that technology should enable individuals to work faster, more, and continuously. In highly digitized industries, this model of expectation fosters an always-on organizational culture, where 24/7 availability is implicit, and “disconnecting” becomes difficult without guilt or symbolic repercussions (Monteiro & Joseph, 2023). In this context, fintech technologies are not merely neutral tools, but actors that shape work culture by mediating constant interaction and the pressure for efficiency.

### **Relevant Theoretical Models**

To understand how fintech contributes to the emergence and consolidation of workaholism, it is essential to anchor the phenomenon within a solid theoretical framework. Three conceptual models provide a relevant analytical foundation: the Job Demands–Resources (JD-R) model, boundary theory, and the model of compulsive work involvement.

The JD-R model posits that occupational stress and associated behaviors—including workaholism—arise from an imbalance between job demands (e.g., tight deadlines, performance pressure, constant connectivity) and available resources (e.g., autonomy, social support, rest time) (Monteiro & Joseph, 2023). In fintech environments, technology simultaneously amplifies both demands (by accelerating workflows) and resources (through automation and access to data), but often in favor of productivity rather than psychological well-being. As a result, employees may develop unhealthy coping strategies, such as compulsive work involvement.

Boundary theory examines how individuals establish and manage the boundaries between their professional and personal roles. In a digital context, these boundaries become porous, and the spatial-temporal separation of work is weakened. Due to its mobile and 24/7 nature, fintech erodes the barriers between “at work” and “at home,” fostering implicit expectations of continuous availability (Shobana & Siddiq, 2024). This role confusion is a predictor of overwork, burnout, and work–life conflict.

This perspective conceptualizes workaholism as the result of dysfunctional internal motivation. Employees do not merely work long hours; they experience a psychological pressure to remain constantly engaged, even in the absence of explicit external demands (Tahir & Aziz, 2019). Digital work environments like those in fintech can fuel this type of behavior through instant feedback, real-time performance metrics, and a reward culture that values nonstop availability.

By integrating these models, it becomes clear that workaholism in fintech is not merely an individual issue, but the outcome of a complex interaction between technological, cultural, and psychological factors that must be analyzed within a systemic framework.

### **The Accelerated Adoption of Financial Technology**

The digital transformation of the financial sector has accelerated significantly over the past two decades, redefining not only how financial services are accessed and delivered, but also internal organizational dynamics. Fintech has become synonymous with disruption: from eliminating traditional intermediaries to creating new business models based on artificial intelligence, automation, and real-time data (Schena et al., 2018).

## **Fintech's Productivity Trap: How Digital Finance Fuels Workaholism**

This digitalization has profoundly altered the organizational culture within fintech companies, particularly through the introduction of a “digital mindset” that emphasizes continuous adaptability, rapid response, and constant engagement. Studies show that this culture is fueled by the pressure to keep pace with technological innovation and to meet the evolving demands of the global market (Hughes et al., 2023).

The widespread adoption of digital tools—such as mobile payment platforms, online lending services, and e-wallets—has influenced not only the client–provider relationship, but also the employee–work relationship. In this hyperconnected ecosystem, employees are often exposed to a “non-stop” culture, where availability and responsiveness become implicit performance criteria. This kind of digital organizational culture proves to be fertile ground for the development of workaholism and burnout (Broby & Karkkainen, 2016).

Moreover, recent research reveals that digitalization promotes decentralized decision-making and a reorganization of work around fragmented and continuously monitored task flows, which can create constant pressure on employees to “stay up-to-date” and “perform” beyond traditional time or space boundaries (Ahmed & Hasan, 2021).

Thus, the adoption of financial technology is not merely a technical evolution, but a complex social process with significant implications for mental health, work–life balance, and how “productivity” is defined in the digitized workplace.

### **“Always-On” Culture and Permanent Digital Availability**

One of the most striking features of digitized work environments in fintech is the “always-on” culture—a continuous state of connectivity and professional availability, enabled by technology. In theory, such practices promote agility and efficiency, but in reality, they often lead to overexertion, burnout, and the erosion of boundaries between professional and personal life.

Recent research indicates that this culture is a direct cause of psychological stress, anxiety, and insomnia among employees. In a study conducted at Magna Automotive India, employees exposed to the pressure of being available outside normal working hours reported high levels of burnout, decreased job satisfaction, and significant work–life imbalance (Aarthi & Deepa, 2024).

This pressure is amplified in fintech environments through the extensive use of mobile apps, real-time communication channels, and AI systems that create “total transparency” of work activities. While these tools are useful for coordination and productivity, they can also generate a form of continuous surveillance that undermines autonomy and limits the employee’s ability to disconnect (Newey, 2021).

Another study focused on tech organizations in India found that employees perceive the “always-connected” culture as a structural barrier to well-being and that, in the absence of clear organizational policies on digital boundaries, this culture becomes normative and self-replicating (Singh, 2021).

Moreover, the implementation of digital mental health intervention platforms in companies—such as mindfulness apps or online psychological support—has shown that permanent availability can reduce engagement with such solutions. Although perceived as flexible and convenient, these tools are often used superficially due to the difficulty in separating personal time from professional obligations (Carolan & de Visser, 2018).

In conclusion, the “always-on” culture is not merely a symptom of digital transformation, but an institutionalized practice that redefines employees’ relationship

with work and personal time, with direct consequences for mental health, personal balance, and the sustainability of work in the fintech sector.

### **The Interface Between Technological Progress and Occupational Stress**

The intense digitalization of work in the fintech sector, while promoted as a driver of efficiency and competitiveness, generates significant side effects on employees' psychological health. Technological progress—particularly through the integration of artificial intelligence, automation, and real-time monitoring—brings with it ongoing organizational pressure for adaptation, performance, and availability. This dynamic is directly linked to rising levels of occupational stress and burnout in digitized industries.

A recent study highlights that digital stressors, such as excessive multitasking and frequent interruptions caused by technological tools, are positively correlated with symptoms of burnout—particularly mental exhaustion and psychological detachment from work (Kaltenegger et al., 2023). This relationship is so strong that researchers have detected measurable physiological changes, such as increased cortisol levels in employees' hair, serving as a biological marker of chronic stress.

Furthermore, the phenomenon of “*digital depression*”—a term used to describe emotional exhaustion caused by technological overload—significantly affects employees' quality of life. They experience constant pressure to stay connected, respond quickly, and remain competitive in an environment where performance indicators are visible, quantifiable, and compared in real time (Johnson & Indvik, 2004).

In the fintech context, this type of occupational stress is rooted in an organizational culture that equates “digital presence” with professional engagement. Employees frequently face implicit expectations to remain active even outside official working hours, leading to chronic fatigue, insomnia, and reduced concentration capacity (de Lourdes & Guilherme, 2016).

Moreover, an observational study on the impact of organizational stress in fast-paced industries found that over 60% of respondents exhibited early signs of burnout, while 5% were already in advanced stages, with evident physiological symptoms and compromised mental health (Gajjar & Amarnath, 2021).

These findings support the notion that, although technology is designed to reduce human effort, in the absence of clear organizational mechanisms to safeguard mental health, technological progress can become a systemic risk factor.

### **The Dynamics of Workaholism in Fintech**

One of the main factors contributing to workaholism in the fintech sector is the blurring of boundaries between professional and personal life. In an environment where digital technology enables work from anywhere at any time, spatial and temporal separation of work becomes nearly impossible. This boundary porosity results in a state of constant availability and internal pressure to remain engaged, even outside contractual hours. Studies show that workaholism frequently emerges in organizational environments where overwork is the implicit norm, driven by technology and the performative culture of startups (Taris & de Jonge, 2023).

In fintech, performance is not merely a measure of efficiency—it is a core component of professional identity. Employees are often evaluated and validated based on their ability to sustain an intense work pace, fueled by aggressive KPIs and real-time feedback. This association between personal value and continuous productivity can lead to compulsive involvement and burnout. Qualitative interviews with self-identified

## **Fintech's Productivity Trap: How Digital Finance Fuels Workaholism**

workaholics reveal that work is perceived not only as the primary source of existential meaning, but also as a form of “socially acceptable addiction” (Hassell et al., 2024).

Fintech amplifies performance pressure through technology—performance tracking apps, transparent dashboards, and algorithmic evaluations. While theoretically intended to promote objectivity, these tools can become sources of constant anxiety and social comparison. The phenomenon is further exacerbated by workaholic leadership styles, where managers set unrealistic expectations through their own behavior. Research shows that a workaholic leader can induce psychological distress in subordinates and normalize overwork as a standard practice (Dong & Li, 2024).

This dynamic is particularly visible in contexts where companies promote hyper-competitive organizational cultures with low tolerance for personal boundaries. Rather than enhancing performance, these environments foster compensatory behaviors, loss of intrinsic motivation, and a decline in overall well-being (Balducci et al., 2020).

### **Mental and Social Health Effects**

Workaholism, fueled by the digital dynamics of fintech environments, has significant consequences for employees' mental health and quality of life. Although often perceived as a sign of professional dedication, this compulsive behavior is associated with a wide range of negative psychosocial outcomes, including emotional exhaustion, insomnia, depression, anxiety, and social isolation.

A comprehensive study on healthcare workers showed that individuals identified as workaholics reported significantly lower quality of life, high levels of psychological stress, and physiological symptoms linked to burnout, such as elevated inflammatory markers (IL6, TNF $\alpha$ ) (Kasemy et al., 2020). Additionally, somatization and sleep disorders were significantly more frequent among these employees.

A recent meta-analysis on medical personnel found direct links between workaholism, burnout, and impaired mental health: workaholic participants reported symptoms of anxiety, depression, difficulty concentrating, and decreased professional efficiency (Barbosa et al., 2024). Sleep quality was also reduced, further intensifying the vicious cycle of chronic fatigue and occupational stress.

Another study focused on active workers demonstrated that burnout mediates the relationship between workplace quality of life and mental health symptoms, confirming the hypothesis that prolonged exposure to excessive demands inevitably leads to a decline in well-being (Pereira et al., 2021).

From an organizational perspective, this deterioration in mental health affects not only the individual, but also team performance and business sustainability. In the long term, companies that tolerate or promote workaholism face higher staff turnover, increased absenteeism, and a loss of professional engagement (Bandelj, 2023).

Thus, rather than serving as a source of competitive advantage, technology-driven workaholism becomes a structural risk factor that undermines mental health and social cohesion within fintech organizations.

### **The Myth of the Heroic Startup**

The startup culture in fintech is often enveloped in a heroic narrative of innovation and perseverance, where overwork becomes a symbol of commitment and entrepreneurial vision. This narrative—heavily inspired by the Silicon Valley model—promotes the idea that rapid success and market disruption can only be achieved through intense labor, personal sacrifice, and risk tolerance. In this context, workaholism is not

merely tolerated but frequently valorized as an essential entrepreneurial trait (Koskinen, 2023).

This mythology is reinforced by the logic of venture capital investment, which favors rapid scaling, the launch of minimum viable products (MVPs), and aggressive responses to market shifts. Startup funding is, in essence, contingent on the founders' ability to perform at maximum intensity, turning the organizational culture into a highly performative and stressful environment (Guo, 2024).

This dynamic creates a simplified identity equation: work = personal value = success. Within this framework, employees are encouraged to exceed their personal limits, and burnout is often perceived as a rite of passage rather than a symptom of a flawed system. Fintech startups are described in the literature as spaces with a “hyperactive entrepreneurial culture,” where creativity, pressure, and the absence of clear regulations coexist in precarious ways (Aloulou, 2021).

Moreover, this founding myth is transmitted to the entire team through recruitment based on “cultural fit”—employees are selected not only for their skills, but also for their willingness to sustain this pace. Studies show that startup firms invest in building an organizational culture that promotes informality, apparent autonomy, and risk-taking—elements that often mask the absence of psychological safety or work–life balance (Lazarova, 2020).

This heroic discourse must be critically reevaluated in light of its long-term adverse effects. Far from being merely a stylistic choice, the myth of the heroic startup can function as an institutional mechanism that normalizes self-exploitation, reduces employees' ability to set healthy boundaries, and perpetuates the risk of systemic burnout.

### **Fintech as Ideological Infrastructure**

Beyond technological innovation and emerging business models, fintech also functions as an ideological infrastructure – a set of norms, values, and beliefs that shape employees' perceptions of work, time, and success. This ideology is fueled by discourses around speed, efficiency, disruption, and performance, creating an organizational culture in which productivity becomes the ultimate criterion for validation.

Studies show that a performance-centered organizational culture exerts significant pressure on employees to conform to dominant norms, even when these norms come at the expense of well-being. This “normative” culture of efficiency is not merely perceived as a set of expectations, but as an ideology that gives meaning and value to professional behavior (Tavares & Xie, 2024).

In fintech environments, algorithms, performance metrics, and digital management tools contribute to the institutionalization of this ideology. In practice, technology becomes not just an operational tool, but a mechanism of symbolic control that defines what counts as “added value” and what is labeled “inefficiency.” This dynamic turns organizational culture into an ideological space, where deviation from hyperproductivity is perceived as a form of failure or lack of commitment (Lakshmi et al., 2024).

A revealing example is the way digital culture encourages the internalization of organizational norms. Employees not only respond to external expectations, but begin to impose increasingly ambitious goals on themselves, leading to a form of legitimate self-exploitation. In this context, workaholism is not an anomaly but a logical outcome of an ideology in which excessive work is synonymous with merit and success (Trasca, 2024).

## **Fintech's Productivity Trap: How Digital Finance Fuels Workaholism**

Moreover, this type of culture inhibits collective mechanisms of resistance. While in other industries, unions or HR policies might mediate organizational imbalances, in fintech, entrepreneurial culture and the meritocratic narrative weaken such balancing mechanisms. As a result, systemic pressures become internalized and perpetuated at an individual level.

In conclusion, fintech operates not only as a technological system but as an ideological framework that normalizes and reproduces overwork as a central organizational value.

### **Intervention Strategies and Possible Solutions**

A critical strategy for combating workaholism in digitized industries like fintech is the introduction of clear regulations regarding the right to disconnect. Legislative models from some European countries have shown that setting legal limits on digital connectivity hours reduces occupational stress and supports mental health. Regulations may include banning professional contact outside of working hours or requiring employers to ensure disconnected breaks (Beaudemoulin et al., 2017).

Fintech organizations can implement digital wellbeing programs that include stress management workshops, strategies for controlling work–life boundaries, and digitally assisted self-care routines. Studies show that personalized and multisensory interventions, such as those based on mindfulness or digital coaching, significantly reduce burnout levels and increase the sense of control over one's professional life (Rich et al., 2020).

To counteract the performative ideology, companies need to rethink their reward and evaluation systems. Instead of relying solely on productivity-based metrics, organizations can introduce indicators of “work quality,” collaboration, work–life balance, and social contribution. Organizational success should also encompass talent retention, employee satisfaction, and collective psychological wellbeing (Ramesh, 2022).

Effective interventions are those developed through participatory processes, involving employees to account for organizational specificities and existing cultural barriers. Engaging employees in identifying problems and designing solutions leads to more sustainable wellbeing programs with higher levels of engagement and effectiveness (Manner et al., 2023).

### **Conclusions**

This paper has explored the hidden dimensions of digitalization in the fintech sector, focusing on a frequently overlooked issue: workaholism fueled by the technological infrastructure and organizational culture specific to this field. While fintech serves as a major catalyst for innovation and financial inclusion, it has also generated a professional paradigm marked by hyperconnectivity, intensified workloads, and blurred boundaries between professional and personal life.

Workaholism in fintech cannot be interpreted merely as an individual expression of professional dedication. On the contrary, it emerges as a logical consequence of a system built on the values of constant performance, speed of execution, and continuous competition. The “always-on” culture—sustained by mobile technology, artificial intelligence, and real-time digital metrics—has transformed the pace of work into a continuous flow, in which personal time becomes an extension of professional responsibilities. In this context, constant availability is no longer a choice but a tacit expectation, while rest and disconnection are seen as obstacles to progress.

This culture of infinite productivity is reinforced by the founding mythologies of the startup ecosystem—especially within fintech—where the narrative of success is constructed around personal sacrifice, relentless work, and near-heroic individual performance. Overwork is not only tolerated but often glorified, while burnout and other forms of psychological exhaustion are normalized as “inevitable costs” of innovation. The meritocratic ideology and the rhetoric of disruption help legitimize this model, turning workaholism into an aspirational ideal rather than an organizational dysfunction.

Against this backdrop, the effects on mental health are profound and well-documented: increased psychological stress, decreased quality of life, insomnia, anxiety, depression, and ultimately, emotional disengagement from work. These symptoms not only affect individuals but have direct consequences for organizational functioning—ranging from staff turnover and declining engagement to the long-term erosion of innovative capacity.

It is therefore imperative for the fintech industry to adopt a more nuanced view of the relationship between technology, work, and well-being. Public policies on the right to disconnect, the implementation of sustainable leadership models, the reformulation of performance indicators, and the co-creation of organizational wellbeing programs are fundamental directions for achieving the necessary rebalancing. Only by acknowledging these imbalances and establishing fair and proactive intervention mechanisms can fintech become not only a symbol of technological progress but also a model of social responsibility and organizational humanism.

Thus, addressing workaholism is not merely a matter of professional ethics—it is an essential condition for the long-term sustainability of a sector at the forefront of global transformations.

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The authors contributed equally to this work.

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## Article Info

*Received:* March 26 2025

*Accepted:* February 10 2025

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### How to cite this article:

Trasca, O. M., Spulbar, A. C. (2025). Fintech's Productivity Trap: How Digital Finance Fuels Workaholism. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 320 – 331.



## ORIGINAL PAPER

# The evolution of e-banking, its security, and its impact on the modern financial system

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### Abstract:

The digital transformation of the banking sector has led to the accelerated development of e-banking services, redefining the way consumers and financial institutions interact. The evolution of e-banking has been driven by technological advances, increased use of the internet and mobile devices, and growing demands for efficiency and accessibility in financial services. This study analyzes the main stages of e-banking development, highlighting emerging trends and factors that have influenced its adoption on a global scale. An essential aspect of e-banking is security, as increasing dependence on digital technologies exposes the financial system to significant cyber risks. In this context, the security measures implemented by financial institutions, such as multi-factor authentication, data encryption, and the use of artificial intelligence in fraud detection, are discussed. The legislative challenges and regulations imposed by authorities to ensure a secure and stable framework for the use of digital banking services are also analyzed. The objective is to examine the impact of e-banking on the modern financial system, highlighting the benefits for banks and customers, such as reduced operating costs, increased financial inclusion, and improved user experience. At the same time, the economic implications of banking digitization are discussed, including changes in the business model of banks and possible systemic risks. Through this analysis, the study provides a comprehensive overview of the evolution of e-banking, highlighting the challenges and opportunities that digitization brings to the financial sector.

**Keywords:** *E-banking, financial digitization, cybersecurity, online banking services, financial regulations, modern financial system.*

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### **Introduction**

The digital transformation of the banking sector is an essential element of the modern economy, having a significant impact on operational efficiency, accessibility of financial services, and transaction security. E-banking, defined as the use of digital technologies to provide banking services, has become a fundamental component of the global financial system, facilitating rapid and efficient interaction between banking institutions and consumers. In a dynamic economic context marked by globalization and technological innovation, digital banking services contribute to increasing financial inclusion, reducing operational costs, and optimizing banking processes.

The development of e-banking is driven by factors such as technological advances, increased demand for fast and convenient services, and the need to adapt to cybersecurity and data protection regulations (Casu et al., 2021, Heffernan, 2005). In this context, analyzing the impact of e-banking on the modern financial system becomes essential for understanding the challenges and opportunities associated with banking digitization.

This study aims to analyze the evolution of e-banking, its security, and its impact on the modern financial system. To this end, the study explores the stages of e-banking development, highlighting the factors that led to its widespread adoption and how it has influenced the transformation of the financial sector. It also assesses the main cyber risks associated with digital banking services, along with the security measures implemented to protect transactions and user data.

The analysis also looks at the impact of e-banking on financial institutions, examining changes in banks' business models and their relationship with customers, as well as the implications for economic stability. The study also aims to formulate recommendations on the sustainable and secure development of digital banking services, taking into account both future prospects and the challenges associated with the accelerated digitization of the banking sector.

### **Research methodology**

The methodology used in this study is based on a descriptive and analytical approach, with academic studies, reports from international financial institutions, banking security regulations, and relevant statistical data as its main sources of information. The research includes a comparative analysis of global trends in e-banking, as well as case studies on the implementation of digital solutions in the banking sector.

We also used qualitative and quantitative methods to highlight the impact of digitization on the financial performance of banking institutions and consumer behavior. Through this approach, we sought to paint a complete picture of the role of e-banking in the digital economy and the challenges associated with its implementation globally.

The study adopts a qualitative and quantitative approach, based on a documentary analysis of the specialized literature, reports from financial institutions, and relevant regulations. The comparison of international trends is complemented by examples of best practices and the interpretation of available statistical data in the field of e-banking. This methodology allows us to outline a holistic view of the economic, operational, and regulatory impact of digital banking services.

### **The evolution of e-banking and the digital transformation of the financial system**

In the context of the digital economy, e-banking is a fundamental pillar of the modernization of financial services, having a significant impact on the operational

efficiency, accessibility, and security of banking transactions. By definition, e-banking refers to the use of digital technologies to provide banking services, allowing customers to perform financial operations via the internet, mobile applications, and other electronic platforms. The essential features of e-banking include continuous availability, global accessibility, reduced operational costs, and the integration of advanced security measures for user data protection (Kumar & Singh, 2020).

The development of e-banking has been analyzed in several stages, each marked by technological advances and changes in consumer behavior. Initially, in the 1960s and 1970s, banks began to implement electronic systems for accounting data management and transaction processing. Later, in the 1980s and 1990s, the emergence of ATMs and the introduction of the first remote banking services by telephone represented important steps towards the digitization of the banking sector. A major milestone was the early 2000s, when the internet enabled the development of online banking services, allowing customers to make transfers, payments, and balance checks independently. With the advent of smartphones and mobile apps in the last decade, e-banking has become ubiquitous, and emerging technologies such as blockchain and artificial intelligence continue to redefine financial services (Ozili, 2018; IMF, 2020).

Over time, the adoption of digital banking services has been driven by several economic and technological factors. A key element was the increase in access to the internet and smart devices, which facilitated digital interaction with financial institutions. Changes in consumer preferences also influenced the demand for fast, secure, and convenient banking solutions, reducing the need for physical interaction with bank branches. From the perspective of financial institutions, digitization has been driven by the need for operational efficiency, cost reduction, and compliance with cybersecurity and data protection regulations (Basel Committee on Banking Supervision, 2018). Competition from FinTech companies and the evolution of the global financial market have forced traditional banks to adapt their business models, accelerating the digitization process.

Current trends in e-banking reflect a shift towards automation, personalization, and advanced security. Artificial intelligence and data analytics are used to improve the customer experience by providing personalized solutions based on their financial behavior. Other relevant studies and various financial approaches have also been published (Pourmansouri, R., et al. 2024), to show the rapid evolution of financial services.

Biometric authentication technologies, such as facial recognition and fingerprint scanning, also contribute to increased transaction security. Blockchain promises to revolutionize the banking industry by eliminating intermediaries and increasing transparency in financial processes (Tapscott & Tapscott, 2016). In the future, e-banking services will become even more integrated into the global digital ecosystem, offering cloud-based financial solutions, instant payments, and increasingly fluid interaction between different financial platforms. The ongoing digitization of banking services is not only redefining the relationship between customers and financial institutions, but also contributing to greater financial inclusion by facilitating access to banking services for segments of the population that were previously excluded from the formal financial system (World Bank, 2021).

Thus, we can say that the evolution of e-banking reflects not only technological progress but also a structural change in the way the financial system works. With all the advantages it offers, this transformation also comes with challenges, including cyber risks,

the need to adapt to new regulations, and maintaining a balance between innovation and security. In this context, banks and financial institutions need to adopt sustainable strategies to fully leverage the benefits of digitalization while maintaining customer confidence and the stability of the global financial system (ENISA, 2021).

### **E-banking security, challenges and solutions in the digital age.**

The digitization of the banking sector has brought significant benefits in terms of accessibility and efficiency of financial services, but it has also created new challenges related to cybersecurity. In an environment characterized by interconnectivity and automation, digital banking systems are exposed to a wide range of threats, including phishing attacks, financial malware, social engineering fraud, and ransomware attacks. Technological innovations in the financial sector have been accompanied by an increase in the complexity and frequency of cyber attacks, requiring proactive measures to protect transactions and sensitive data (Kumar & Singh, 2020; Ozili, 2018).

In addition, the increased use of mobile banking services and digital payments exposes users to additional risks, such as interception of communications or compromise of devices through malicious applications. To combat these threats, financial institutions are implementing advanced security measures designed to reduce the vulnerabilities of digital systems and protect customer data. Multi-factor authentication has become standard practice, combining traditional passwords with biometric methods such as facial recognition or fingerprinting, and with unique codes generated by tokens. Advanced data encryption also plays a key role in protecting information transmitted between customers and banking institutions, preventing unauthorized access to transactions. In addition, real-time monitoring of banking activities through advanced fraud detection algorithms allows suspicious behavior to be identified and attacks to be prevented before they cause significant damage (ENISA, 2021; IMF, 2020).

Internationally, e-banking security is regulated by a series of standards and directives designed to ensure consumer protection and financial sector stability. The General Data Protection Regulation (GDPR) imposes strict requirements on the management and security of personal information, while the Payment Services Directive (PSD2) promotes the use of strong customer authentication and facilitates collaboration between traditional banks and new financial service providers. The standards set by the Payment Card Industry Data Security Standard (PCI DSS) define best practices for protecting card transactions, reducing the risk of fraud and data theft. Financial institutions must also comply with the requirements imposed by national and international regulatory bodies, which require the implementation of robust mechanisms to protect against cyber attacks and report security incidents.

With regard to security, (Trufaşu, 2004) emphasizes the need for proactive policies and continuous investment in cyber protection technologies, given the increasing sophistication of cyber attacks. In the same vein, the PCI DSS standards and PSD2 requirements are highlighted by Turban et al. (2018) as essential elements in defining a framework of trust for users of digital banking services.

In this context, emerging technologies play a crucial role in strengthening e-banking security. Artificial intelligence allows large volumes of data to be analyzed to detect anomalies and prevent financial fraud by identifying unusual trading patterns. Machine learning algorithms are capable of identifying cyber attacks in their early stages, enabling financial institutions to respond quickly and effectively. Blockchain, with its decentralized architecture and advanced cryptography mechanisms, offers an innovative

solution for protecting transactions and reducing the risk of data manipulation. The implementation of smart contracts within digital banking platforms can help automate and secure financial processes, eliminating the need for intermediaries and reducing system vulnerabilities.

As e-banking services continue to evolve, cybersecurity is essential for maintaining consumer confidence and protecting global financial stability. Banks need to invest in innovative solutions, adapt to new regulations, and collaborate with cybersecurity experts to counter emerging threats. In an increasingly complex digital ecosystem, the success of e-banking depends on the financial sector's ability to strike a balance between innovation and protection, thereby ensuring a safe and efficient environment for users.

### **The impact of e-banking on the modern financial system**

The digital transformation of the banking sector has led to a revolution in financial services, fundamentally changing the operational models of banking institutions, consumer behavior, and the structure of the financial market. E-banking, through the digitization of banking services, has generated significant benefits for financial institutions, consumers, and the economy, but it has also brought new risks that require careful management.

Financial institutions have benefited considerably from e-banking, achieving operational efficiency and reducing administrative costs. The automation of banking processes, the use of artificial intelligence, and the adoption of digital platforms have enabled banks to optimize resources and offer personalized services with a high degree of accessibility. At the same time, digitization has improved risk management capabilities through advanced data analysis and fraud detection systems. Another major advantage is market expansion by reducing dependence on physical branches, which allows banks to grow their customer base globally. In addition, the integration of new financial technologies has increased the competitiveness and adaptability of banking institutions to market demands.

From the consumers' perspective, e-banking has revolutionized the way they access and use financial services, offering them greater flexibility, speed, and transparency. Other relevant studies and various financial approaches have also been published (Birău et al. 2024), to show the rapid evolution of financial services.

Online transactions, mobile payments, and access to personalized financial services have simplified the interaction between customers and banks. A key aspect is the increase in financial inclusion, as digitization has enabled access to banking services for segments of the population that previously had no opportunity to interact with traditional financial institutions. E-banking platforms reduce geographical and economic barriers, facilitating access to essential financial products such as savings accounts, loans, or insurance. In addition, transparency and instant access to financial information give consumers greater control over their own resources and expenses.

Studies conducted by (Niemi et al. 2006) also indicate that customer satisfaction with e-banking is strongly correlated with ease of use, which implies investments in the intuitive design of digital platforms and in the financial education of users.

The digitization of banking services has led to fundamental changes in banks' business models, forcing them to adopt innovative solutions and redefine their operational strategies. The classic model, based on physical branches and face-to-face interactions, has been gradually replaced by digital platforms, leading to a significant reduction in

## **The evolution of e-banking, its security, and its impact on the modern financial system**

operating costs. In addition, banks have had to collaborate with fintechs and other financial technology companies to improve their services and remain competitive in the market. Strategic partnerships between banks and fintechs have led to increased innovation in financial products, such as instant payments, digital loans, and automated investment solutions. This ongoing adaptation is essential to maintaining competitiveness in an increasingly dynamic financial environment.

Despite its many benefits, banking digitization also generates systemic risks and significant economic challenges. Increased dependence on technology exposes financial institutions to cyber risks, which can affect both data security and the stability of the entire banking system. Cyberattacks, security breaches, and digital fraud can have major economic consequences, affecting consumer confidence and compromising the functioning of financial institutions. Banking digitization can also contribute to the exclusion of social groups that do not have access to the internet or modern technologies, which can exacerbate economic inequalities. Another challenge is adapting to ever-changing regulations, which impose strict compliance and security measures on banks.

In this context, the impact of e-banking on the modern financial system is complex, balancing the advantages of digitization with the associated risks. As technologies evolve and regulations adapt to new economic realities, financial institutions must find solutions to maximize benefits, minimize risks, and maintain economic stability. Thus, the future of e-banking depends on the banking sector's ability to adopt technological innovations, ensure data security, and provide accessible and sustainable financial services for the entire population.

### **Conclusions and recommendations**

The evolution of e-banking has had a profound impact on the modern financial system, redefining the operating models of banking institutions, changing consumer behavior, and influencing the structure of financial markets. The digitization of banking services has led to increased operational efficiency, reduced costs, and expanded access to financial products, contributing to the strengthening of financial inclusion globally. Banks have adopted innovative tech solutions based on artificial intelligence, blockchain, and predictive analytics to offer personalized services and improve transaction security. However, the expansion of e-banking has also generated significant challenges, including cyber risks, data protection issues, and increased dependence of the financial system on digital infrastructure.

The future development of e-banking will depend on the banking sector's ability to innovate and respond to emerging challenges. One of the main areas of development is the integration of advanced technologies to enhance security and reduce vulnerabilities to cyber attacks. The implementation of biometric authentication solutions, the use of artificial intelligence for fraud detection, and the development of blockchain-based infrastructures can help strengthen user confidence in the digital banking system. Another challenge is adapting to new data protection and transaction security regulations, which impose strict compliance and operational transparency measures on banks. In addition, the transition to a fully digital banking model requires substantial investments in IT infrastructure and consumer education to ensure the effective adoption of new financial solutions.

From an economic and financial perspective, the expansion of e-banking has major implications for public policies and sectoral regulations. Financial authorities must maintain a balance between promoting innovation and ensuring the stability of the banking

system by developing flexible legislative frameworks capable of responding quickly to changes in the digital sector. At the same time, economic policies must support investment in digital infrastructure and facilitate access to technology for the less banked segments of the population. Strengthening international cooperation in financial regulation is essential to prevent systemic risks and ensure a safe and sustainable framework for the development of e-banking globally.

Consequently, the future of e-banking depends on the ability of banks and regulators to manage the complexity of a digitized financial environment, ensuring the security, accessibility, and stability of the system. Adopting an integrated strategy that combines technological innovation with effective regulatory measures and financial education will be essential to maximising the benefits of digitisation and creating a more resilient and inclusive financial system.

#### **Authors' Contributions:**

The authors contributed equally to this work.

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**Article Info**

*Received:* May 18 2025

*Accepted:* May 30 2025

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**How to cite this article:**

Nioață (Chireac), R.-M., Filip, R. D., Lupu (Filip), G. A.-M., Mărgăritescu, S. (2025). The evolution of e-banking, its security, and its impact on the modern financial system. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 332 – 340.



## ORIGINAL PAPER

# Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study

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Lupu (Filip)<sup>6)</sup>, Mircea Laurentiu Simion<sup>7)</sup>**

### Abstract:

The main aim of this research paper is to investigate Japanese stock market volatility using symmetric and asymmetric GARCH models. The Nikkei 225 index is the Tokyo Stock Exchange index of 225 publicly owned liquid companies across industries, and the index is calculated using price-weighted-average method. It has been very effective in representing the market sentiment and macroeconomic condition of Japanese Stock market, in this context due to lack of related studies it becomes imperative to study the volatility of the Index. For this purpose, the following models, such as: GARCH, I-GARCH, T-GARCH, E-GARCH, P-GARCH, AP-GARCH (APARCH) were tested across Normal Distribution, Student's T Distribution, Generalized Error Distribution, Parametric T distribution and Parametric Generalized Error Distribution. Based on AIC, SIC and Log Likelihood APARCH at Generalized Error Distribution was chosen. The model displayed strong forecasting capability and from the analysis volatility clustering and asymmetry was evident. It was also identified that the index is sensitive to the leverage effect.

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**Keywords:** *asymmetry, GARCH models, conditional variance, Nikkei 225 index, volatility, Tokyo Stock Exchange, leverage effect, stock market*

**JEL Classification:** C22, C58, G1, G12, G15

### **Introduction**

Volatility is one of the most important factors that is considered while reviewing any time series for any purpose. In the context of financial time series, volatility holds various connotations not only related to plain statistics, but every movement has deep impacts both intrinsically and extrinsically, and holds the attention of not only investors but also academicians and policymakers at large. In this context, stock exchange indices are the indicator of the overall market and are sensitive to even small changes in the macroeconomic context.

One of the major stock exchanges in the world is the Tokyo Stock Exchange (TSE) and which is among the top 5 stock exchanges based on market capitalization. Very little attention has been paid by the academic community to the Japanese stock market and its other possibilities (Kato & Schallheim, 1985). The clearing facilities at Tokyo stock exchange is noisy and inefficient (Amihud & Mendelson, 1991). A sentiment analysis done using positive and negative affirmations in the Wall Street Journal and the NIKKEI index helped in predicting prices 3 days in advance. (Ishijima et al., 2015). The Exchange operates in 2 sessions, 9:00 AM to 11:30 AM and 12:30 PM to 3:30 PM.

NIKKEI 225 is a price-weighted average index of 225 highly capitalised and liquid, publicly-owned companies across various industries, operating in Japanese Yen. An excellent and curious investigation has been made, where it has been noted that some stocks in the index is overweighed by a factor of 10 or more, and co-movement with stocks within the index has positive correlation and has a negative correlated co-movement with stocks outside the index. (Greenwood, 2008). NIKKEI 225 ETFs occupy almost 2% of NIKKEI 225 stocks, and due to macroeconomic trends, the deviations are observed (Hanaeda & Serita, 2017). This selected stock market index seems to be an effective indicator for the market sentiment and macroeconomic variables in Japanese stock market.

### **Literature review**

Over time, a variety of empirical studies focused on the stock markets behavior have been consolidated in the specialized literature using GARCH family models, such as the following: Kumar et al. (2023a), Spulbar et al. (2023), Meher et al. (2024), Birau et al. (2021), Trivedi et al. (2021), Kumar et al. (2023b), Birau and Trivedi (2013) and many others.

Birau et al. (2014) have investigated the dynamics of the emerging stock market in India for the sample period from January 2002 to June 2014 based on GARCH (1,1) model. Moreover, Spulbar et al. (2022) have conducted an empirical research study in order to examine the behavior of the developed stock market in Japan, considering the daily prices of NIKKEI 225 stock index. The econometric framework was based on GARCH models, such as GARCH (1,1), EGARCH (1,1) and GJR (1,1) models and the sampled period was very long, from July 1998 to January 2022, but consisting of daily observations.

## **Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study**

Nakayama and Yokouchi (2025) investigated the complex behavior of the developed stock market in Japan considering the impact of the news. Marumo and Li (2024) conducted an empirical study on the behavioral dynamics of stock markets in Japan and Australia under the influence of risk, based on ASX 200 and Nikkei 225 stock indices, using expectile regression model. Moreover, in the literature there is a wide variety of empirical studies that comparatively analyze the behavior of certain stock markets, such as: Trivedi and Birau (2013a), Birau et al. (2023), Trivedi and Birau (2013b), Siminica and Birau (2014).

In this context, not only the price movement but also the deviance from the mean value becomes important for a greater understanding of investment, economy, and policy-level purposes. Noting the volatility of an index or any financial time series is not exclusive to statistical areas but has wider implications holistically. Due to this very reason, anyone interested in Japan in terms of an economic point of view, NIKKEI 225 stock index should be their first source of enquiry. Understanding the volatility of this index thus becomes very imperative. There are several approaches to calculating the volatility and one of the most advanced and precise tools available in econometric terms is understanding Autoregressive Conditional Heteroskedasticity in Autoregressive (AR) and Moving Average (MA) terms. One of the latest models in that certain context is the GARCH family models, each model having the capability to calculate conditional volatility along with slight modifications based on distribution and Asymmetric configurations. One of the recent improvements in financial time series analysis is being used in terms of Machine Learning models using Neural Networks, however, its utility is more towards forecasting and not volatility analysis. In one of the studies 71 parameters were utilised and using 18 variables ANN architecture was effective in predicting the NIKKEI 225 prices (Qiu et al., 2016).

### **Research Methodology**

The application of data is based on secondary data, and the data are quantitative in nature. This work analyses various methods to evaluate the quantitative impact of NIKKEI 225, the Tokyo Exchange stock. The volatility analysis is observed for 1334 days from 07/10/2019 to 21/03/2025. Log return had been calculated to make the data stationary. Volatility clustering had been spotted in data that leads to applying the ARCH LM test for heteroscedasticity in the return series residuals. Volatility has been proved by using different GARCH family models employing different distributions, such as the Normal (Gaussian), Student's t, and Generalised Error Distribution (GED), both with and without pre-specified parameters. The selection of the most suitable GARCH model for analysis is based on the values of AIC, SC, and Log Likelihood. The software package used for financial econometric analysis is EViews 12.

### **Significance of the study**

The research delivers societal value through a more comprehensive insight into the dynamics of financial markets. GARCH models are applied to observe the volatility of the NIKKEI 225 index. A thorough understanding of market volatility is essential for investors, financial institutions, and government bodies, as it helps them to mitigate risks, improve their decisions and create better, more effective strategies. Existing literature is scarce on the subject, and no study so far has explored the individual analysis of NIKKEI 225. The study has high significance not only for the investors but also equally important for corporations to understand index dynamics, as they are influenced by both internal

factors and external environmental conditions.

### **Limitations of the study**

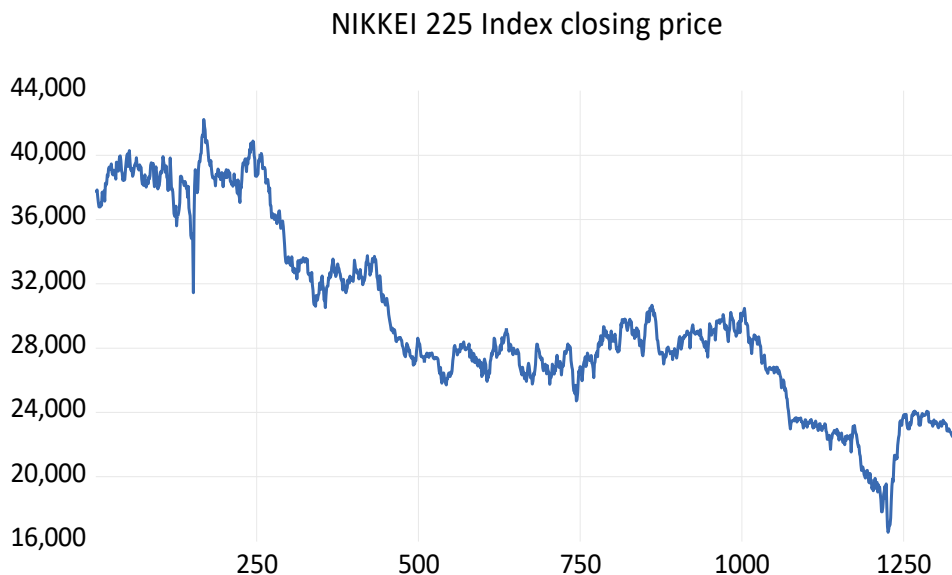
The study offers a detailed volatility analysis using daily data and focuses on conditional return variance, simplifying real-world complexities and creating a generalised framework that's more theoretical than practical, and it might not fully answer all relevant questions.

- Limited availability of data: Data was extracted from the Tokyo stock exchange database, which is freely available. Lack of financial backing meant this study had to take a general approach, unable to delve into the details of micro-level variations.
- Generalisation of result: Despite its flexibility and ability to cover several GARCH models, APARCH model struggles to capture the subjective nature in complex real-world scenarios.
- Model sensitivity to varied situations: APARCH model is great for understanding volatility on a theoretical level, accounting for various factors like leverage and decay effects, and volatility clustering. However, it might struggle to uncover the subtler, unique drivers of a particular situation.

Acknowledging the unique strengths and weaknesses of both the APARCH and GARCH models, we'll now move forward with the analysis and estimation in the research.

### **Empirical analysis, estimation, and results**

For a better understanding of price movement, we look at the price movement visually. Below is the graphical representation of actual prices.



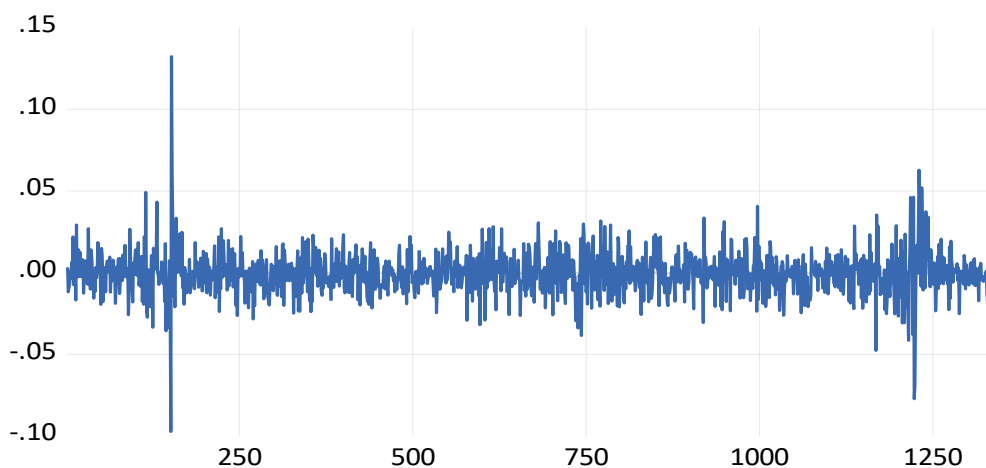
**Figure 1.** Daily Closing Price of Index  
Source: author's Computation using EViews 12

## Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study

The above graphical representation is of the NIKKEI 225 index price over a given time period, showing a clear overall downward trajectory. Index begins at a high level, above 36000 and rises briefly above 40000 and then drops sharply. The early phase of the graph reflects significant market volatility, with fluctuation indicating the period of instability. After the initial fall, the index continues to decline slowly, with small ups and downs, interspersed with minor recoveries. This phase suggests market stabilisation, but fails as the overall market movement remains downward. Around the midpoint of the graph, the index fluctuates between 26000 and 28000, which shows a sign of unification. In the later stages, the declines become steeper once again, and the index falls below 20000 before a slight recovery at the end. The pattern shows how the Japanese stock market dropped a lot after a big rise and took a long time to recover.

To make returns stationary, the log return has been calculated, and the below is the graphical representation of the log return. As discussed earlier that there are fluctuations over the period of time.

NIKKEI 225 Index log returns



**Figure 2:** Log Returns Graph

Source: author's Computation using EViews 12

The visual pattern hints at possible heteroscedasticity. It is crucial to first verify the stationarity of the data.

### Test of stationarity

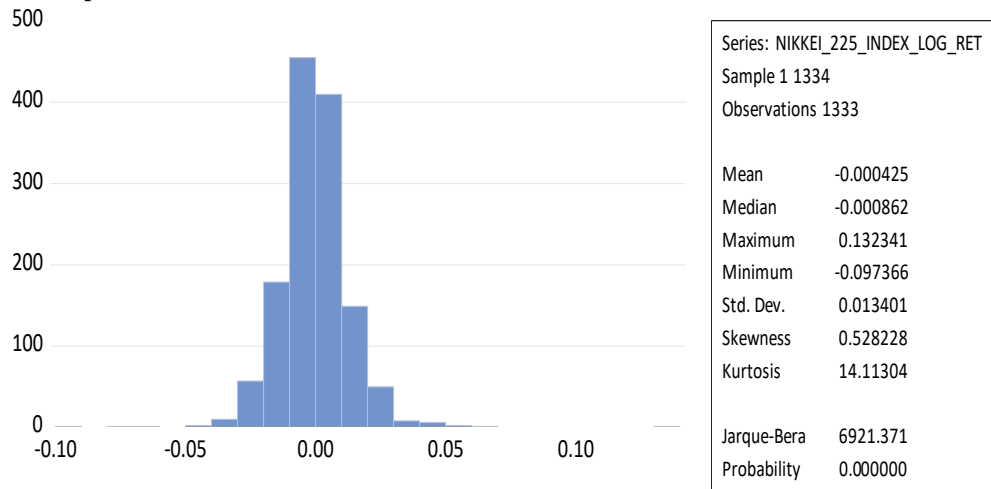
Null Hypothesis: NIKKEI_225_INDEX_LOG_RETURNS has a unit root			
Exogenous: Constant			
Lag Length: 0 (Automatic - based on SIC, maxlag=22)			
		t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic		-36.98114	0.0000
Test critical values:	1% level	-3.435049	
	5% level	-2.863502	
	10% level	-2.567864	

\*MacKinnon (1996) one-sided p-values.

**Table 1** Augmented Dickey-Fuller (ADF) test  
Source: Author's computation using EViews 12

The above test is an Augmented Dickey-Fuller test, and it can be observed that the probability value is less than 0.05. Consequently, we reject the Null hypothesis test, and the given data has no unit root and is stationary.

### Descriptive Statistics



**Figure 3:** Test Distribution Analysis  
Source: Author's computation using EViews 12

The above statistics show that the average log return is scarcely negative. The central value is approximately close to zero, suggesting a nearly symmetric distribution. The standard deviation is very low, which signifies that most of the datasets are close to the mean value and less deviated. A high kurtosis value shows a leptokurtic distribution and slight positive skewness, which indicates extreme values as compared to a normal distribution. To analyse further, we need to check the ARCH effect on the given dataset through the ARCH LM Test.

### Heteroscedasticity Test

Heteroskedasticity Test: ARCH			
F-statistic	474.9144	Prob. F(1,1329)	0.0000
Obs*R-squared	350.4108	Prob. Chi-Square(1)	0.0000

**Table 2.** ARCH effect test  
Source: Author's computation using EViews 12

From the above table, it can be observed that the ARCH test result shows the p-value (0.0000) is strong substantiation of the ARCH effect in the given dataset, suggesting that the data exhibits volatility clustering.

**Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study**

		<b>GARCH</b>	<b>IGARCH</b>	<b>TARCH</b>	<b>EGARCH</b>	<b>PARCH</b>	<b>APARCH</b>
<b>Normal Distribut ion</b>	<i>Akaike info criterion</i>	-5.987515	-5.94637	-6.01175	-5.99922	-5.98728	-6.01263
	<i>Schwarz criterion</i>	-5.968017	-5.934671	-5.98835	-5.97582	-5.96388	-5.98533
	<i>Log Likelihood</i>	3992.685	3963.283	4009.826	4001.48100	3993.52600	4011.409
	<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>	-6.022177	-5.95762	-6.03515	-6.02919	-6.02067	-6.03387
	<i>Schwarz criterion</i>	-5.998779	-5.94794	-6.00785	-6.00189	-5.99337	-6.00268
	<i>Log Likelihood</i>	4016.77	3967.835	4026.41	4022.44	4016.764	4026.56000
	<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>Generali zed Error</b>	<i>Akaike info criterion</i>	-6.024738	-5.97943	-6.03931	-6.03251	-6.02335	-6.038316
	<i>Schwarz criterion</i>	-6.001339	-5.96137	-6.01201	-6.00521	-5.99605	-6.007118
	<i>Log Likelihood</i>	4018.475	3987.32	4029.179	4024.653	4018.548	4029.519
	<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 distributi on (Paramet er)</b>	<i>Akaike info criterion</i>	-6.022152	-5.988011	-6.03610	-6.02915	-6.02070	-6.03496
	<i>Schwarz criterion</i>	-6.002654	-5.97631	-6.01270	-6.00575	-5.99730	-6.00766
	<i>Log likelihood</i>	4015.754	3991.015	4026.044	4021.413	4015.788	4026.28300
	<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>Generali zed Error</b>	<i>Akaike info criterion</i>	-6.024042	-5.992784	-6.04004	-6.03236	-6.03922	-6.03922
	<i>Schwarz criterion</i>	-6.004543	-5.981084	-6.01664	-6.00896	-6.01192	-6.01192

(Parameter)	<i>Log Likelihood</i>	4017.012	3994.194	4028.667	4023.554	4029.117	4029.117
	<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

**Table 3:** Decision Table

Source: Author's tabulation using MS Office

Implementing GARCH, IGARCH, TARCH, EGARCH, APARCH, and PARCH among Gaussian Normal Distribution, Student's t distribution, Generalised Error distribution(GED), t distribution, and GED with fixed parameter, from the above table, it can be concluded that APARCH model generalised error distribution is the most suitable model due lowest Akaike info criterion (-6.038316), the lowest Schwarz criterion (-6.007118) and the highest Log likelihood (4029.519).

Dependent Variable: NIKKEI_225_INDEX_LOG_RETURNS Method: ML ARCH - Generalised error distribution (GED) (Marquardt / EViews legacy) Date: 05/22/25 Time: 23:01 Sample (adjusted): 2 1333 Included observations: 1332 after adjustments Convergence achieved after 26 iterations 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	-0.001017	0.000297	-3.427512	0.0006
NIKKEI_225_INDEX_LOG_RETURNS(-1)	-0.018951	0.027380	-0.692147	0.4888
Variance Equation				
C(3)	1.18E-06	3.27E-06	0.361834	0.7175
C(4)	0.054931	0.046643	1.177695	0.2389
C(5)	0.620136	0.451933	1.372185	0.1700
C(6)	0.813824	0.047169	17.25336	0.0000
C(7)	2.530963	0.648632	3.902002	0.0001
GED PARAMETER	1.426157	0.073738	19.34081	0.0000
R-squared	-0.001710	Mean dependent var		-0.000427
Adjusted R-squared	-0.002463	S.D. dependent var		0.013406
S.E. of regression	0.013422	Akaike info criterion		-6.038316
Sum squared resid	0.239608	Schwarz criterion		-6.007118

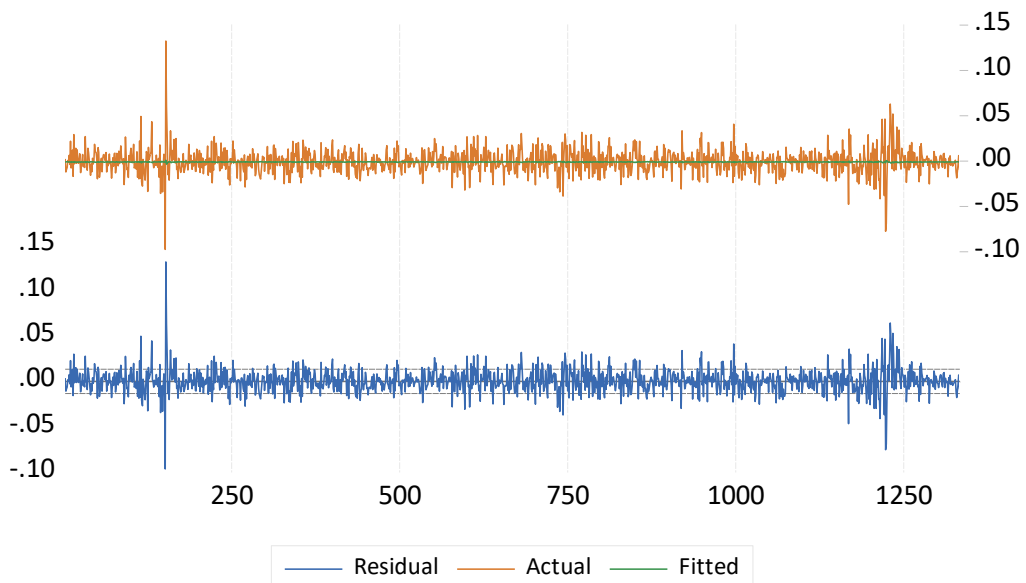
## Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study

Log likelihood	4029.519	Hannan-Quinn criter.	-6.026625
Durbin-Watson stat	1.984487		

Table 4 APARCH(1,1) generalised error distribution

Source: Author's computation using EViews 12

From the above APARCH(1,1) model, it can be concluded that C6 has strong volatility clustering, which also states that past volatility influences future volatility. C4 and C5 are not statistically significant, the overall model effectively captures the volatility clustering. The GED Parameter is also highly significant. Durbin-Waston stat (1.984487), which indicates there is no major autocorrelation in residuals. Model diagnostics also include Akaike info criterion(-6.038316), Schwarz criterion (-6.007118) and Log likelihood(4029.519), suggesting a well-fitting model. There is a chance of volatility clustering and the leverage effect. The result also emphasises market risks, which is important for investors and risk managers.



**Figure 4.** Graphical representation of estimated volatility

Source: author's Computation using EViews 12

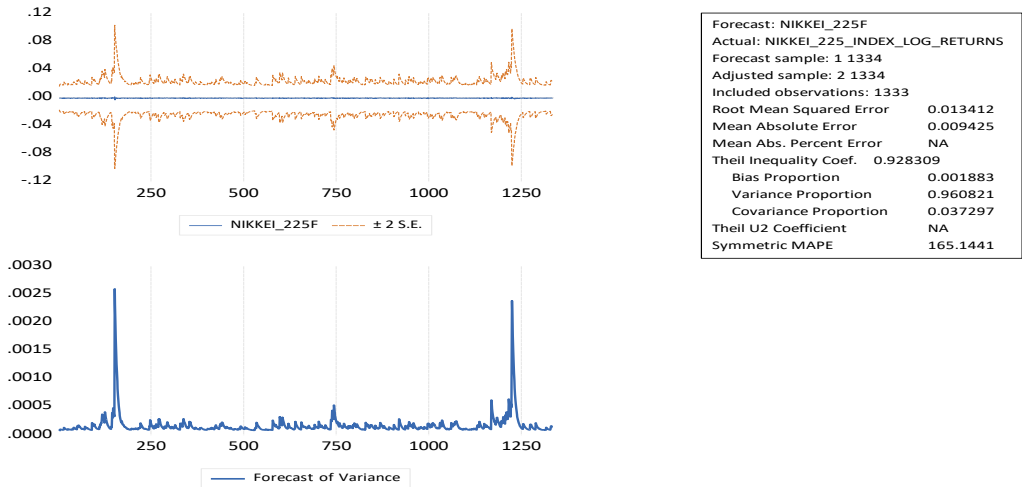


Figure 5: Graphical representation of Forecast of Prices, Returns, and Volatility  
Source: author's Computation using EViews 12

From the above pictures, it can be stated that the residuals are centred around zero, indicating there is no significant bias, and fitted values closely track actual returns. The difference between the actual value and the predicted value is small, and errors are close to zero. Spikes in the forecast variance graph match the period of high market movement, which means the model successfully captures uncertainty and or increased risk. The model demonstrates strong forecasting capacity and appropriate for analysing and predicting market volatility of returns.

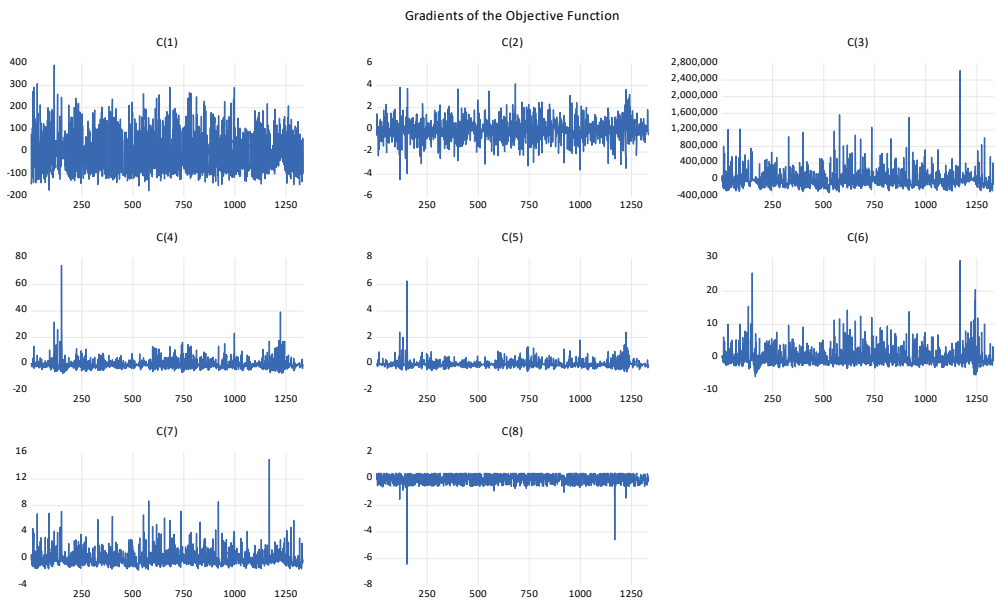


Figure 6: Gradients of the objective function  
Source: author's Computation using EViews 12

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The above graph shows the gradients of the objective functions from the coefficients C1-C8 in the model. Gradients help to assess how sensitive the objective functions are. The gradients are fairly stable and fluctuate around zero, indicating that the model parameters were estimated efficiently and the optimization process was smooth. Parameters C3 and C6 show occasional spikes, which indicate that there are temporary effects due to market volatility. C3 is associated with the variance constant, which shows higher volatility. C8 remains close to zero, implying it was estimated with greater precision and had less impact on instability.

### Conclusions and recommendations

A study comparing GARCH, TGARCH, IGARCH, EGARCH, PARCH, and APARCH models across six different distributions founds that the APARCH model with generalised error is the fittest model for the analysis of NIKKEI 225 index, and it was concluded that there was asymmetric, volatile clustering, leverage effect and volatility. Although APARCH model is a fine model, it fails to incorporate other finer details caused by the other variables, resulting in the generalisation of calculated results. For the academic community, it is essential to do an in-depth analysis of other finer details to avoid the generalisation of results. For this, various models are used, such as ML, AI, VAR, COPULA, etc., which are multivariate and show the larger picture that benefits society, investors and government for better policy formulation.

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### Article Info

*Received:* May 21 2025

*Accepted:* June 01 2025

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### How to cite this article:

Raza, S., Shreevastava, A., Meher, B. K., Birau, R., Margaritescu, S., Lupu (Filip), G. A. M., Simion, M. L. (2025). Exploring Japanese stock market volatility using symmetric and asymmetric GARCH models: A case study. *Revista de Științe Politice. Revue des Sciences Politiques*, no. 86, pp. 341 – 353.



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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>

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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%3D8dda05f3-1%2FSET%3D1%2FSHW%3FFRST%3D1&signature=eBtSKEx2BuW-HASpUsCT39FB3vQpIm6cGAajCH-kz44&showCoverImg=1](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%3D8dda05f3-1%2FSET%3D1%2FSHW%3FFRST%3D1&signature=eBtSKEx2BuW-HASpUsCT39FB3vQpIm6cGAajCH-kz44&showCoverImg=1)

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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<https://copac.jisc.ac.uk/search?&isn=1584-224x>  
ACPN Catalogo Italiano dei Periodici, Università 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-](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-)

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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-](https://beluga.sub.uni-hamburg.de/vufind/Search/Results?submit=Suchen&library=GBV_ILN_22&lookfor=1584-224x)

[hamburg.de/vufind/Search/Results?submit=Suchen&library=GBV\\_ILN\\_22&lookfor=1584-224x](https://beluga.sub.uni-hamburg.de/vufind/Search/Results?submit=Suchen&library=GBV_ILN_22&lookfor=1584-224x)

Edith Cowan Australia

<https://ecu.on.worldcat.org/search?databaseList=&queryString=1584-224X>

University College Cork, Ireland

[https://ucc.summon.serialssolutions.com/?q=1584-](https://ucc.summon.serialssolutions.com/?q=1584-224X#!/search?ho=t&jt=Revista%20de%20Stiinte%20Politice&l=en-UK&q=)

[224X#!/search?ho=t&jt=Revista%20de%20Stiinte%20Politice&l=en-UK&q=](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-](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)

[224X&searchscope=1&SORT=D&extended=0&SUBMIT=Search&searchlimits=&searchorigarg=i1583-9583](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-](https://opac.giga-hamburg.de/ezb/detail.phtml?bibid=GIGA&colors=7&lang=en&flavour=classic&jour_id=111736)

[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=ucvpress](http://muse.lib.ksu.edu.tw:8080/1cate/?rft_val_fmt=publisher&pubid=ucvpress)

Western Theological Seminar

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[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)

Swansea University Prifysgol Abertawe

[http://whel-primo.hosted.exlibrisgroup.com/primo\\_library/libweb/action/search.do?vid=44WHELF\\_SWA\\_VU1&reset\\_config=true#.VSU9SPmsVSk](http://whel-primo.hosted.exlibrisgroup.com/primo_library/libweb/action/search.do?vid=44WHELF_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 \(Electronic Journals Library\)http://rzblx1.uni-regensburg.de/ezeit/detail.phtml?bibid=AAAAA&colors=7&lang=de&jour\\_id=111736](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)

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>

University of the West Library

<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=U>

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TCOOKIE=TRUE&COUNT=15&GWTIMEOUT=30&HIGHLIGHTING=on&HISTO  
RY=SESSION&START=1&STREAMING=on&URLENCODING=TRUE&QUERY a  
IAL=1584-  
224x&SERVICEGROUP1.SERVICE.SEARCH\_EDS=on&SERVICEGROUP1.SERVI  
CE.SEARCH\_KUGJSON=on&SERVICEGROUP1.SERVICE.SEARCH\_KUGUSBW  
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&pcAvailabilityMod  
e=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](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=1000  
000000726583&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](https://infoguide.ub.uni-passau.de/InfoGuideClient.upasis/start.do?Query=10%3d%22BV035261002%22)

BSB Bayerische Staatsbibliothek

<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=mmm&Language=de  
Technische Hochschule Ingolstadt  
https://opac.ku.de/TouchPoint/start.do?Branch=3&Language=de&View=thi&Query=35  
=%22502495838%22+IN+\[2\]](https://opac.deutsches-museum.de/TouchPoint/start.do?Query=1035%3d%22BV035261002%22IN%5b2%5d&View=mmm&Language=de)

Hochschule Augsburg, Bibliothek

[https://infoguide.hs-  
augsburg.de/InfoGuideClient.fhasis/start.do?Query=10%3d%22BV035261002%22](https://infoguide.hs-augsburg.de/InfoGuideClient.fhasis/start.do?Query=10%3d%22BV035261002%22)

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Hochschule Weihenstephan-Triesdorf, Zentralbibliothek  
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<https://ffwtp20.bib-bvb.de/TouchPoint/start.do?Query=1035%3d%22BV035261002%22IN%5b2%5d&View=ffw&Language=de>

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.swnd.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>

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<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)

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<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

<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/fundacionargeninta5/docs/diciembre\\_2021\\_fundaci\\_n\\_argeninta-ai\\_ok?fr=sZjg2NjE5NTg3OTY](https://issuu.com/fundacionargeninta5/docs/diciembre_2021_fundaci_n_argeninta-ai_ok?fr=sZjg2NjE5NTg3OTY)

## CEPOS NEW CALL FOR PAPERS 2026

<https://www.schoolandcollegelisting.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>

<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>

## CEPOS NEW CALL FOR PAPERS 2026

Intraders

<https://www.intraders.org>.

[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#ah=15737604302246&referrer=https%3A%2F%2Fwww.google.com&\\_tf=De%20pe%20%251%24s&share=https%3A%2F%2Fwww.intraders.org%2Fnews%2Fromania%2F10th-internationalconference-after-communism-east-and-west-under-scrutiny%2F](https://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#ah=15737604302246&referrer=https%3A%2F%2Fwww.google.com&_tf=De%20pe%20%251%24s&share=https%3A%2F%2Fwww.intraders.org%2Fnews%2Fromania%2F10th-internationalconference-after-communism-east-and-west-under-scrutiny%2F)

10 times

<https://10times.com/after-communism-east-and-west-underscrutiny>

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

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<https://www.sciencedz.net/conference/42812-9th-international-conference-after-communism-east-and-west-under-scrutiny>

### 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/>

**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:-securiteee-&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:-securiteee-&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\\_Communism.\\_East\\_and\\_West\\_under\\_Scrutiny\\_8-9\\_April\\_2016\\_Craiova\\_Romania](https://www.researchgate.net/publication/283151988_Call_for_Papers_6TH_International_Conference_After_Communism._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>

## CEPOS NEW CALL FOR PAPERS 2026

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/>  
KNOW A CONFERENCE KNOW A CONFERENCE-  
<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  
<http://natocouncil.ca/events/international-conferences/>

### 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 Sowipor, Koln, Germany, <http://sowipor.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/>.



## RSP MANUSCRIPT SUBMISSION

### GUIDELINES FOR PUBLICATION

#### *REVISTA DE ȘTIINȚE POLITICE. REVUE DES SCIENCES POLITIQUES (RSP)*

Email: Manuscripts should be submitted online at [cepos2023@gmail.com](mailto:cepos2023@gmail.com) with the following settings:

Page setup: B5 JIS

Paper title: For the title use Times New Roman 16 Bold, Center.

Author(s): For the Name and Surname of the author(s) use Times New Roman 14 Bold, Center.  
About the author(s): After each name insert a footnote (preceded by the symbol \*) containing the author's professional title, didactic position, institutional affiliation, contact information, and email address.

E.g.: Anca Parmena Olimid\*, Cătălina Maria Georgescu\*\*, Cosmin Lucian Gherghe\*\*\*

\* Associate Professor, PhD, University of Craiova, Faculty of Social Sciences, Phone: 00407\*\*\*\*\*, Email: [parmena2002@yahoo.com](mailto:parmena2002@yahoo.com). (Use Times New Roman 9, Justified)

\*\* Lecturer, PhD, University of Craiova, Faculty of Social Sciences, Phone: 00407\*\*\*\*\*, Email: [cata.georgescu@yahoo.com](mailto:cata.georgescu@yahoo.com). (Use Times New Roman 9, Justified)

\*\*\* Lecturer, PhD, University of Craiova, Faculty of Social Sciences, Phone: 00407\*\*\*\*\*, Email: [avcosmingherghe@yahoo.com](mailto:avcosmingherghe@yahoo.com). (Use Times New Roman 9, Justified)

Author(s) are fully responsible for the copyright, authenticity and contents of their papers. Author(s) assume full responsibility that their paper is not under review for any refereed journal or conference proceedings.

#### Abstract

The abstract must provide the aims, objectives, methodology, results and main conclusions of the paper (please submit the papers by providing all these information in the abstract). It must be submitted in English and the length must not exceed 300 words. Use Times New Roman 10,5, Justify.

#### Keywords

Submit 5-6 keywords representative to the thematic approached in the paper. Use Times New Roman 10,5, Italic. After the keywords introduce three blank lines, before passing to the Article text.

Text Font: Times New Roman: 10,5

#### Reference citations within the text

Please cite within the text. Use authors' last names, with the year of publication.

E.g.: (Olimid, 2009: 14; Olimid and Georgescu, 2012: 14-15; Olimid, Georgescu and Gherghe, 2013: 20-23).

On first citation of references with more than three authors, give all names in full. On the next citation of references with more than three authors give the name of the first author followed by “et al.”.

To cite one Article by the same author(s) in the same year use the letters a, b, c, etc., after the year. E.g.: (Olimid, 2009a:14) (Olimid, 2009b: 25-26).

#### References:

The references cited in the Article are listed at the end of the paper in alphabetical order of authors' names.

References of the same author are listed chronologically.

#### 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.

#### Tables and Figures

Tables and figures are introduced in the text. The title appears above each table.

E.g.: Table 1. The results of the parliamentary elections (May 2014)

Proposed papers: Text of the Article should be between 3000-5000 words, single spaced, Font: Times New Roman 10,5, written in English, submitted as a single file that includes all tables and figures in Word2003 or Word2007 for Windows.

All submissions will be double-blind reviewed by at least two reviewers