

# ANALELE UNIVERSITĂȚII DIN ORADEA



## RELAȚII INTERNAȚIONALE ȘI STUDII EUROPENE

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# ANALELE UNIVERSITĂȚII DIN ORADEA

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## La France et la Roumanie dans la période de la guerre froide. Une analyse du discours

*Antoanela Paula MUREȘAN\**

**Abstract.** *La présente démarche scientifique est une analyse des discours du président français Charles de Gaulle suite à un voyage officiel qu'il a fait en Roumanie en 1968. Nous avons envisagé d'identifier les thèmes des discours et le registre stylistique. Par cette analyse on peut mieux comprendre les rapports franco-roumains dans la période de la guerre froide et aussi la vision du président français sur le rôle que son pays pourrait jouer sur la scène des relations internationales.*

**Keywords:** *discours, la cortine de fer, l'Europe, indépendance, l'année 1968*

En laissant que son pays soit gouverné par le premier ministre, George Pompidou, bien que la situation en France fût critique, le général Charles de Gaulle, président de la République Française, rend une visite officielle de 5 jours (14-18 mai 1968) en Roumanie.

Le présent article s'inscrit dans la démarche scientifique d'analyser les discours que le président a tenus pendant son voyage officiel. Les deux discours qu'on va analyser *le discours prononcé à l'Université de Bucarest, le 18 mai 1968<sup>1</sup> et l'allocution prononcée à la radiodiffusion et la télévision Roumaines, le 18 mai 1968<sup>2</sup>* représentent une suite au discours devant la Grande Assemblée Nationale de la République Socialiste de Roumanie, le 15 mai 1968, discours qui a été le sujet d'une autre démarche scientifique. L'intérêt pour ce thème vient du désir de mieux comprendre les relations franco-roumaines pendant cette période difficile du point de vue politique, c'est-à-dire la période du rideau de fer, et de mieux comprendre le rôle que la France a joué dans cette période-là au niveau européen et, pas dernièrement, le rapport politique qu'elle avait avec la Roumanie.

La démarche scientifique va être structurée en deux parties, c'est-à-dire l'analyse du contenu des discours mentionnés ci-dessus. Comme instruments de travail méthodologique on utilisera la méthode quantitative. L'analyse de contenu d'un discours, en général, comporte le décryptage du message. On va insister sur les thèmes des discours et le registre stylistique utilisé. Dès le début il faut préciser que les discours en question appartiennent au discours politique. Les acteurs du discours politique, présidents, premiers ministres, sénateurs, ministres etc. sont très importants pour comprendre le discours politique (Obeng, Hartford, 2012 :8). En général, les discours politiques sont structurés en deux thèmes: nous et vous, positif et négatif, pro et contre (Borțun, Săvulescu, 2005: 110). L'antithèse permanente utilisée dans ce type discursif valorisera, tout d'abord, l'impact

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<sup>1</sup> <http://www.charles-de-gaulle.org/pages/1-homme/accueil/discours/discours-au-monde-1958-1969/discours-prononce-a-l-universite-de-bucarest-18-mai-1968.php>, dernier accès le 05.10.2016.

<sup>2</sup> <http://www.charles-de-gaulle.org/pages/1-homme/accueil/discours/discours-au-monde-1958-1969/allocution-prononcee-a-la-radiodiffusion-et-la-television-roumaine-18-mai-1968.php>, dernier accès le 05.10.2016.

sur le récepteur. Les spécialistes du domaine considèrent que le discours politique doit se servir de quelques moyens rhétoriques. Parmi eux, les plus notables sont: la circonlocution, le parallélisme, la créativité, l'intertextualité, l'analogie, la métaphore, l'euphémisme et l'évasion (Obeng, Hartford, 2012 :7). Leurs utilisation est explicable car le discours politique a pour but principal la persuasion. C'est grâce à elle que l'acteur politique peut convaincre les adeptes et les opposants aussi. Le discours politique incite à l'action, car le but final est de prendre le pouvoir.

Le lieu que le président français a choisi pour tenir un de ses discours, *l'université*, a une importance particulière car, au moment quand il était en Roumanie, en France les étudiants manifestaient avec véhémence. L'année 1968 est restée dans la mémoire collective universelle comme une année qui a changé le monde. Ce fut l'année de la radicalisation, plongeant la cinquième république dans une crise profonde. La crise a touché toutes les couches de la société. Ce fut une crise sociale, économique et politique. Les structures autoritaires ont été interrogées. Ce qui s'est passé en France a bouleversé tout le continent. Des mouvements sociaux ont eu lieu aussi en Allemagne et en Italie, mais chacun avec ses particularités. Le moteur des révoltes en France, les étudiants, ont eu le rôle capital dans les événements de '68. Ils contestaient les valeurs de la société traditionnelle. Les slogans entendus à Paris : *Il est interdit d'interdire, Make love not war, Ni maitre, ni Dieu, Dieu c'est moi, Le patron a besoin de toi, tu n'as pas besoin de lui, Enragez-vous, Fin de l'université, Et si on brûlait la Sorbonne, Ouvrez les fenêtres de vos cœurs, On achète ton bonheur, vole-le ! Changez la vie, donc transformez son mode d'emploi*,<sup>3</sup> pour en citer les plus connus, montrent la pensée « révolutionnaire et contestante » de la génération '68. Même à présent on n'a pas réussi à définir ou à attribuer un seul mot aux événements de mai '68 : émeute, révolte, révolution<sup>4</sup>. Dans ce contexte intérieur du pays, le président de Gaulle a visité la Roumanie, pour faire connaître encore et encore son rêve : *l'Europe des patries* ou *l'Europe des nations* (Laffan, 2005 : 51) pour lequel il avait lutté pendant plus d'une décennie, et en même temps de voir les événements de Paris en *perspective*<sup>5</sup>. Si en France la situation était extrêmement tendue, en Roumanie, le président Nicolae Ceaușescu gouvernait le pays dans un climat intérieur favorable et tranquille. Le péril pour Ceaușescu pourrait se déclencher, au niveau extérieur, quand l'Union soviétique a envahi la Tchécoslovaquie, en août 1968. Mais, il a su manipuler l'Occident pour se transformer en *de Gaulle of Eastern Europe* (Judt, 2006 : 378). Par un discours qui est même aujourd'hui une référence, Ceaușescu a gagné l'appui du monde démocratique, en se transformant en un vecteur politique qui militait pour l'indépendance du pays et pour la sortie de l'influence soviétique. Il a refusé de participer à l'intervention des troupes du Pacte de Varsovie. Ainsi, il a eu la reconnaissance et l'appréciation des leaders du monde, parmi lesquels le président américain Richard Nixon, la reine d'Angleterre, Elisabeth II et le président français Charles de Gaulle, pour mentionner les plus importants.

Après le salut standard, dès le début, de Gaulle insiste sur les relations franco-roumaines. En plus, il souligne le fait que ses attentes quand il a accepté l'invitation n'ont pas été en vain. Il se sent à l'aise auprès de la communauté académique roumaine. Les

<sup>3</sup> <https://libcom.org/history/slogans-68>, dernier accès le 05.10.2016.

<sup>4</sup> <http://www.ina.fr/video/CAA7800621601>, dernier accès le 05.10.2016.

<sup>5</sup> <https://books.google.ro/books?id=bnIMYz8GRKQC&printsec=frontcover&dq=max+gallo+la+statue+de+commandeur&hl=ro&sa=X&ved=0ahUKEwjqqoWppqDQAhVE7xQKHRJoBNgQ6AEIGzAA#v=onepage&q=max%20gallo%20la%20statue%20de%20commandeur&f=false>, dernier accès le 05.10.2016.



rapports franco-roumains sont à son avis séculaires, traditionnels, ce qui met en évidence une histoire commune et partagée par les deux peuples. Au-delà de ceci, quand il y a une excellente coopération entre deux pays, une communauté peut être fondée. Un premier élément introduit dans le discours fait référence *aux événements nouveaux* et à cause de cela l'auditeur est déjà cointéressé.

*Monsieur le Recteur,  
Mesdames et Messieurs les Professeurs,  
Mesdames et Messieurs,*

*Je savais bien qu'en me rendant à l'aimable invitation de l'Université de Bucarest je ne m'y sentirais pas étranger. Mais l'impression que j'éprouve auprès de son Recteur et en présence de ses maîtres et de ses étudiants passe, de loin, mon espérance. En vérité, dans notre rencontre, il y a beaucoup plus qu'un échange d'amitiés séculaires et d'hommages traditionnels. Ce qui s'élève de cette assemblée, c'est la certitude, qu'en raison d'événements nouveaux, une communauté franco-roumaine est en train de reflourir aux plus hauts sommets de l'esprit.*

Ce qui détermine que les deux pays soient en coopération, c'est leur origine latine. Grâce à leur latinité ils ont pu évoluer ensemble. Ils ont pu se développer ensemble. Leur latinité a été le lien de coopération dans des domaines divers : art, science, lettres etc. L'histoire de ceux deux pays semble similaire du point de vue de leurs efforts de garder leur héritage romain. Pour garder la langue et la culture, les deux éléments qui personnalisent un peuple, les Roumains et les Français ont dû se battre avec les Slaves, les Magyars, les Ottomans et respectivement les Germaniques et les Anglo-saxons. Le président prononce une phrase très connue en roumain *Mult e dulce si frumoasa limba ce vorbim !* qui a un impact émotionnel sur le public. Les valeurs matérielles et spirituelles qu'un pays détient sont ses biens et lui donnent la spécificité. La culture se construit peu à peu, avec des efforts, des sacrifices. Elle modèle les êtres humains. Elle aide au développement des êtres humains. C'est la lumière pour chaque individu. En plus, les cultures se différencient les unes des autres, ce qui les rend uniques. L'identité nationale, au-delà des frontières, est basée, en outre, sur la langue, la culture et l'histoire. Ce sont les trois caractéristiques sur lesquelles le président insiste pour la création de *l'Europe des patries*. On remarque dans la construction du discours une parallèle, une comparaison entre la France et la Roumanie. Les questions rhétoriques utilisées n'attendent pas de réponses. Elles ne font que de communiquer des impressions. Les similitudes vécues par les deux peuples, mentionnées par les questions rhétoriques, montrent, en effet, une stratégie aussi persuasive que possible.

*Assurément, il y a longtemps que la Roumanie et la France se sont jointes dans les domaines de la pensée, des lettres, de l'art, de la science. Étant toutes deux latines, elles ont eu l'une et l'autre à soutenir, pour le rester, des efforts rudes et incessants.*

*Vous, Roumains, entourés que vous étiez de Slaves, de Magyars, d'Ottomans, tandis que vous luttiez, d'abord pour conquérir, ensuite pour maintenir, votre indépendance, au prix de quelles peines et grâce à quels mérites avez-vous gardé votre langue et votre culture? "Mult e dulce si frumoasa limba ce vorbim!". Comment n'eussiez-vous pas tourné vos espoirs du côté des Français qui vous étaient si semblables? Et comment ceux-ci auraient-ils pu manquer de vous porter une amitié littéralement fraternelle, alors qu'eux-mêmes, contenant la poussée des Germaniques et celle des Anglo-Saxons, s'efforçaient d'être fidèles à leurs héritages, celte, gaulois et romain ?*

Mêmes si les distances éloignent, une approche spirituelle peut exister entre deux pays. C'est le cas évoqué dans le discours, entre la France et la Roumanie. Les élites ont

fait que cette approche se manifeste totalement. La Roumanie, grâce à ses universités de Bucarest et Iassy, a opté pour la langue française comme langue d'enseignement. Ainsi, un échange culturel et académique entre les deux pays a eu lieu. Toujours, la France et la Roumanie avaient joui des œuvres que les écrivains, artistes ou savants réussissaient à faire connaître. Il rend hommage aux élites roumaines et françaises qui ont eu le mérite de développer cette collaboration. Le fait que le président prononce les noms d'Alecsandri, Eminescu, Aman, Grigorescu, Cantacuzène et Tzitzeica souligne le fait qu'il connaît la culture roumaine, qu'il apprécie les élites roumaines et que l'échange culturel mentionné a eu des modèles qui sont inoubliables.

*C'est pourquoi, tandis que les deux peuples, quel que fût l'éloignement où les tenait la géographie, s'entraidaient par la politique et, en certains cas, par les armes, une compréhension et une sympathie exceptionnelles s'établissaient entre leurs élites. C'est votre sang qui coulait dans les veines de notre Ronsard. Dès l'origine, vos universités de Bucarest et de Iassy enseignaient le français à la jeunesse des Principautés. Par la suite, combien de professeurs et d'étudiants roumains sont venus travailler chez nous ! Quel accueil vous réserviez toujours à nos idées et à nos œuvres ! Réciproquement, depuis plus d'un siècle, des écrivains comme Alecsandri ou Eminescu, des artistes comme Aman ou Grigorescu, des savants comme Jean Cantacuzène ou Tzitzeica, ont fait notre admiration, en même temps qu'Edgard Quinet, Michelet, Mario Roques, Henri Focillon et d'autres, qui étaient connus de vous, nous apprenaient à vous aimer.*

La séparation de notre continent en deux blocs ne peut faire en sorte que la coopération franco-roumaine soit arrêtée. Cette division de continent a aggravé leur relation, mais le président de Gaulle est fermement convaincu que le problème de doute entre les deux pays est hors de question. Même s'il accepte la séparation politique, de Gaulle considère que du point de vue intellectuel et moral les Français et les Roumains sont sur la même ligne. Le leader français dégage une position optimiste. Il utilise des mots qui réconfortent et qui changent l'état d'esprit. (*un grand vent salubre se lève d'un bout à l'autre de notre continent, dissipant les nuées et ébranlant les barrières*). Les barrières entre les pays peuvent tomber car la situation sur le continent peut changer. La force de l'exemple est ce qui compte. La force de l'exemple fait la différence. Un échange se réalise seulement s'il y a de la volonté, une caractéristique essentielle dans les rapports entre les pays. La volonté et la libre initiative, sans aucune contrainte, mènent au progrès.

*Il est vrai que les bouleversements infligés à notre Europe par la dernière guerre mondiale, puis l'opposition des deux blocs qui la divisent encore aujourd'hui, ont donné à croire que Roumains et Français pouvaient être intellectuellement et moralement séparés comme ils semblaient l'être politiquement. Mais ce n'étaient là qu'apparences. En fait, malgré les difficultés des contacts et des informations, jamais en France on n'a douté de vous et je crois bien que jamais vous n'avez douté de la France. Or, voici qu'un grand vent salubre se lève d'un bout à l'autre de notre continent, dissipant les nuées et ébranlant les barrières. De cette évolution, nos deux peuples donnent l'exemple, parce qu'ils la veulent dans leurs profondeurs. Du coup, et tandis qu'ils entreprennent de rapprocher leurs politiques ? à preuve ma présence ici ? ils renouent entre eux les rapports culturels privilégiés qui les ont liés si longtemps.*

Même si deux pays sont éloignés l'un de l'autre, quand il y a de la volonté, les choses fonctionnent. L'étude de la langue française dans les écoles roumaines est une réalité. Deuxièmement, au niveau du monde scientifique, les accords de collaboration se développent. Au-delà de ces accords déjà paraphés, il y en a encore d'autres à être signés. Ainsi, l'avenir est prometteur et par cette collaboration le message que le président

français veut transmettre est que le continent ne doit pas être divisé. Approcher l'Europe par des accords culturels, scientifiques, politiques, c'est le message du président de Gaulle. Si ces accords sont paraphés, L'Europe ne peut pas être divisée. Un accord signifie un partenariat, une collaboration, donc, le président veut créer un réseau d'accords en Europe. Le fait qu'on utilise le *pronom politique* (nous) souligne le contraste avec les autres. Il s'agit de la solidarité entre les Français et les Roumains et de la distance par rapport aux autres.

*C'est ainsi, par exemple, qu'en vertu d'un accord conclu il y a trois ans par les deux Gouvernements, vous développez dans vos écoles l'étude de la langue française ; qu'à la suite d'une convention passée l'année dernière entre votre Académie des sciences et notre Centre national de la Recherche les missions scientifiques s'échangent en nombre croissant ; que nos respectifs Commissariats à l'Énergie atomique ont commencé à coopérer ; que, prochainement, sera installé chez vous un centre commun de documentation technique ; que, sans doute, pourra entrer bientôt en application l'arrangement intervenu quant aux visites que les jeunes se rendraient de part et d'autre. Certes, il n'y a là qu'un début et nous pouvons faire ensemble beaucoup mieux. Mais c'est un fait essentiel que les prétextes et les artifices, qui à ces divers égards nous avaient tenus éloignés, sont en train d'être surmontés.*

En plus, dans le discours il y a une parallèle entre la France et la Roumanie. Ils sont toujours en tandem. Les deux pays ont toujours vécu presque la même histoire. L'Europe, à sa vision, était en plein processus de changement. Elle n'était pas contente de sa propre situation. Elle voulait quelque chose de différent pour son avenir. La France et la Roumanie doivent s'aider l'une l'autre pour deux raisons : tout d'abord pour rester deux modèles à suivre, et d'autre part pour que leur humanité et leur performance, ou bien puissance, soient montrées au monde entier. Le discours finit par une note optimiste sur l'avenir de *notre Europe*, évoquant l'espoir que la France et la Roumanie construiront une Europe forte, capable d'assurer sa sécurité. *Jadis, votre pays, constamment menacé dans sa substance, et le mien, aux prises en permanence avec les plus dures rivalités, firent de leurs origines latines le ciment de leur union. Aujourd'hui, portés à s'entraider, d'une part pour rester ce qu'ils sont au sein d'une Europe qui se cherche en sortant du régime des blocs, d'autre part pour faire valoir ce qu'ils ont d'humain et d'efficace dans un monde en pleine gestation, ils remontent tous deux aux mêmes sources dont ils sont issus et grâce auxquelles leurs rimes sont des sœurs.*

Le deuxième discours, *l'allocution prononcée à la radiodiffusion et la télévision Roumaine, le 18 mai 1968*, finit le périple discursif du président français. C'est autour de trois mots essentiels qu'il va construire son discours : être honoré, heureux et touché.

Le fait qu'il est honoré est traduit par le respect et la considération qu'il porte au peuple roumain. La Roumanie a respecté le peuple français et, au cours d'histoire, ils sont devenus amis. La Roumanie a fait son épreuve au cours de la première et deuxième guerre mondiale. Elle a montré ses valeurs même si cela a signifié des drames familiaux. Au nom du pays et pour le pays tout sacrifice mérite d'être fait. Le peuple se réunit dans des moments décisifs pour son destin. La solidarité y est nécessaire; en effet, elle rend le peuple plus fort, elle lui donne du courage pour atteindre son but. Dans un monde où la Roumanie était considérée un satellite de l'Union soviétique, le fait qu'elle est plus roumaine que jamais, ça lui rend une indépendance envers les grands pouvoirs. Être plus roumaine peut être traduit par le fait qu'elle a gardé sa langue, sa culture, et elle a assumé son histoire. Être plus roumaine peut également signifier qu'elle veut rester et milite pour

son indépendance. Être plus roumaine, c'est aussi le fait d'avoir défendu les valeurs nationales dans lesquelles elle a cru et pour lesquelles elle a fait de grands sacrifices, même des sacrifices humains. Elle a montré du courage, de la responsabilité, une fermeté circonscrite à un pays fort et digne.

*A vous tous, Roumaines et Roumains, je dis ce soir combien je suis honoré, heureux, touché, de vous avoir rendu visite.*

*J'en suis honoré, parce qu'ainsi j'ai pu vous apporter le salut de mon pays. Il y a bien longtemps que nos deux peuples sont amis. Mais c'est surtout au cours des grandes épreuves de ce siècle qu'on a apprécié, en France, toute la valeur de la Roumanie. Nous, Français, mesurons en connaissance de cause ce que ces guerres, ces drames et ces bouleversements ont représenté de sacrifices et de chagrins pour chacune de vos familles en même temps que pour votre patrie. Nous n'ignorons pas que vous y avez fait face avec un magnifique courage. Nous savons que la Roumanie, bien que réduite dans sa superficie, en est sortie plus roumaine que jamais.*

Deuxièmement, le président de Gaulle montre un état de bonheur à l'égard de la Roumanie. Il présente le motif et, en plus, il explique son état. Tout d'abord il s'agit d'un développement dans plusieurs domaines de la vie économique. L'industrie, l'agriculture, l'enseignement et la science sont soulignés comme des domaines représentatifs qui sont à leur tour le moteur du pays. L'image qu'il décrit pour la Roumanie est celle d'un pays frétilant, très bien organisé, dans lequel chaque individu connaît son travail et le fait au plus haut niveau et où rien n'est laissé au hasard. Ce modèle de pays que la Roumanie montre au monde peut être aimé par la France. Et puisque la France aime la Roumanie, elle la désire florissante et puissante. La France veut que la Roumanie soit à côté d'elle dans son essai de changer l'Europe, *notre* Europe. A son avis, à ce moment-là, l'Europe n'était pas libre. Le président considère que pour le développement et pour assurer la paix sur le continent il faut accomplir trois objectifs : que chaque pays soit indépendant, qu'on mette fin aux deux blocs qui se sont créés en Europe et que les pays commencent à collaborer les uns avec les autres.

*Je suis heureux d'être venu. Car, à côté des belles et nobles choses que le passé vous a léguées, j'ai vu quels progrès modernes vous êtes en train d'accomplir, dans l'industrie, l'agriculture, l'enseignement, la technique. J'ai vu de vos usines en plein rendement, de vos champs très bien cultivés, de vos jeunes gens remplis d'ardeur, de vos professeurs, ingénieurs, spécialistes, débordant de capacités. Mais aussi j'ai vu votre peuple, fier, actif et bien vivant. Aucun pays du monde ne pourrait s'en réjouir plus que la France qui, depuis toujours et surtout aujourd'hui, aime et estime la Roumanie ; la France qui souhaite ardemment la voir forte et prospère ; la France qui compte la trouver à ses côtés afin d'aider notre Europe à respirer enfin librement, grâce à l'indépendance de chaque nation, à la fin des blocs opposés, à la franche coopération établie d'un bout à l'autre pour la paix et pour le progrès.*

La manière de recevoir un invité dit beaucoup sur la relation entre deux ou plusieurs personnes. Le fait que dans tout son voyage le président français a été accueilli avec de chaleureux applaudissements lui a rendu grand plaisir. En effet, c'est l'accueil que les Roumains avaient fait traditionnellement aux Français. Ce qui fait rester dans la mémoire du public, suite à un discours, c'est l'habileté de l'émetteur de prononcer quelques mots dans la langue maternelle de l'audience. De Gaulle l'a fait, en finissant son discours avec quelques phrases en roumain. Évoquant encore une fois le grand plaisir qu'il a eu et en précisant qu'il allait garder les souvenirs de cette visite pour toujours, le président français a fini le discours par la classique formule *Vive la Roumanie!*

*Je suis touché jusqu'au plus profond de mon âme par votre accueil, par la façon dont la France, en ma personne, a été reçue chez vous, par les émouvantes acclamations que d'innombrables hommes, femmes, enfants, roumains lui adressèrent à mon passage, tour à tour à Bucarest, à Craiova, à Bals, à Slatina, à Pitesti, à Topoloveni, à Gaesti, à Tirgoviste, à Ploiesti, etc.*

*Da ! Toate marturiile care, peste tot si in chip unanim, mi le-ati dat de vazut, de auzit si de inteles vor lasa o amintire nestearsa, pentru intotdeauna, exceptionalei noastre prietenii.*

*Fiecareia si fiecareia dintre voi, multumesc mult, si noroc bun !  
Traiasca România !*

La recherche nous relève quelques conclusions en ce qui concerne l'analyse du discours du président Charles de Gaulle lors de sa visite en Roumanie. Tout d'abord, par cette visite officielle, de mai 1968, de Gaulle a certifié le président communiste Nicolae Ceaușescu. Deuxièmement, on peut parler d'un paradoxe politique, car au moment de la visite, la France était en pleine action contestataire du système politique, social et moral. L'explication pour cette visite peut résider dans le fait de voir les choses passées en France « en perspective ». Troisièmement, du point de vue de son idéologie, de Gaulle insiste sur l'indépendance de chaque pays de l'Europe, il milite pour *l'Europe des patries*, il considère que la division de l'Europe en deux blocs est une erreur fatale et il est convaincu que la situation changera. Il offre une solution surtout socio-économique à ce problème éminemment politique : la coopération entre les pays de l'Europe Occidentale et ceux de l'Europe Orientale. Le cas France-Roumanie peut devenir un modèle de bonnes pratiques entre États en pleine période de la guerre froide, un modèle créé par la rhétorique de son discours politique.

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## THE CONDITION OF JEWS IN THE TIME OF HOLOCAUST AND ITS AFTERMATH AS REFLECTED IN PUBLISHED MEMOIRS

Anca OLTEAN\*

**Abstract:** *The present study presents a few from the most well known Jewish memoirs written by Jewish intellectuals, active in the life of Jewish Community from Romania during the Holocaust years and in its aftermath, after the setting of communism in Romania. The books come with a personal note, an inner vision about the condition of Jews in fascist and early years of communism, about the ideal of "liberty" in a world of storm, of military confrontation, racism and anti-Semitism. From these memoirs, it emerges the particular spirit of Jewish Community with his fight for survival, between adaptation to the politics of spheres of influence and emigration.*

**Keywords:** *Jews, community, communism, war, Holocaust, social activism, survival, Israel.*

The theme 'The history of Jews in Romania and Hungary (1945-1953) in the Romanian and Hungarian historical writing' was the topic of PhD thesis, a very important, actual topic whose continuous reinterpretation and analysis from different angles is required. During the communist regime, in Romania the condition of ethnical minorities and their particularism were totally neglected. The book written by the rabbi of Romania, Moses Rosen, comes to confirm the existence and continuity of Jewish community in Romania during the communist years. (Rosen, 1991)

In spite of ongoing, continuous process of emigration from the communist times, the Romanian state did not succeed to erase completely the existence of Jewish community from Romania from the national spectrum. Only in contemporary times, in the endless process transition of Romanian society towards the democratic values, it seems that there are not left in Romania the Jews, excepting a merely community of a few thousands of people. Even so, the remaining Jews try to administrate the Jewish patrimony in Romania and to preserve the religion and the community spirit of a disappearing community.

In local archives especially, there is a lot of materials concerning the Jews that urges to be researched further. But, in what concerns the written volumes, after the Revolution from December 1989, it has been published a lot of valuable material, volumes of documents, memories and specialized and general papers that make reference to the Jewish minority in the space of Romania and Hungary.

In our scientific itinerary, an important role was played by edited memoirs. Their writers suffered as a consequence of Nazi opprimation, in their *memoirs* their life experiences being reflected by a subjective manner, but full of advice. Such *memoirs* are

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written by Moses Rosen, Tereza Mozes, Carol Buium Beniamini, Serge Moscovici, Șlomo Șitnovitzer, Valentin Saxone, Emil Dorian, Arnold Schwefelberg.

In addition the *memoirs* are together with other first hand sources, the questionnaires that we only remember here, are completed by some Jews from Oradea, survivors of the Holocaust, or relatives of Jews who survived to ghettoization and deportation, important sources of my PhD thesis, revealing important moments from Jewish life. Thus were questioned Hommonai Maria who filled in the questionnaires in the name of her deported parents Schwartz Iosif and Schwartz Ileana, Braun Vioara (survivor of Holocaust), B. Sz. (refugee), Steier Elisabeta, Bone Gabriela (deported), Kincses Ecaterina (had more deported relatives), Varady Judith (deported), Somogyi Livia (who completed the questionnaire in the name of deported father). These Jews did not emigrate in Israel after the war, but remained in Romania. Concerning their reactions with the Romanian ethnics, at the end of the war, the opinions differ. Some consider they were received back with coldness, others with friendship. Their material proprieties, they had recuperated only to a small extent.

An important category of papers which present from "the source", by means of personal experience of the authors, a state of fact that happened in a certain historical circumstance, local or international, *the memoirs* are an important source of information. Of course, they can have an important dose of subjectivity due to exceptional *moments* by which the author had passed, be them happy or hard. Together with other sources of information: original archival documents, specialized papers written by specialist historians, oral history data, published Jewish memories contribute to the deepening and widening of historical truth, giving a particular note to its understanding.

Moses Rosen, in the book *Primejdii, încercări, miracole. Povestea șef-rabinului Dr. Moses Rosen / Dangers, tries, miracles. The story of chief-rabbi Moser Rosen PhD*, (Rosen, 1991) describes his own life. Moses Rosen was the chief rabbi of Romania during the communist years. His journal covers also the period that interests us, the years 1945-1953. In his memories, he details his fight of mediator between the communist power and the large masses of Jews with the view of the facilitation of the emigration in Israel. The rabbi disposes of a very special power of persuasion in front of communists, convincing them that the emigration of the Jews in Israel is a necessity. He plays a dangerous role, risking in every moment his liberty. The rabbi tries to prevent the Jewish local leaders who worked for the Judaic cult to leave the country in order to stay home and to provide the religious service to the ones who did not want to leave the country.

Tereza Mozes published her journal *Decalog însângerat/ Bloody Decalogue*. (Mozes, 1995) Her memories present a personal vision on Holocaust of a Jewish woman, deported from Oradea, who lost several members of her family in the storm of Holocaust, who found the interior resources that, after her return from the detention, to continue her studies in art history and ethnography and to make a family, to start a new life, choosing to remain in Romanian communist state.

Tereza Mozes describes the years spent during the period of the ascension of Nazis Germany, in the time of detention in the ghetto from Oradea, respectively the period of detention in German concentration camps. She came from a family of business men; she was a graduate of a theoretical high school, real profile, working as a tailor in the period of the anti-Semite legislation. She supported the nightmare of deportation to Oradea by the Hungarians with all the privations and weaknesses to which the Jews from Oradea were subjected during the passing through several concentration camps, including Auschwitz. Their setting free by Russian soldiers and their way home are only a few



stages through which the author had been through. The dramatic character of the memories is given by the fact that the author was the subject of Horthy's persecution and witness to the drama of those days, but also because of the fact that she had lost numerous members of her family in the storm of Holocaust. Tereza Mozes succeeded to recall the events she had been through, getting involved, personally, on the wire of her memoirs influenced by the experience she lived.

The volume of Emil Dorian entitled *Cărțile au rămas neterminate /The books remained unfinished. Journal 1945- 1948*, (Dorian, 2006) starts its story right after the end of the war, in 1945. His quality of writer is revealed also with the occasion of this volume and alternates with the quality of participant to a political world in the process of change, with significant changes in the life of the Jews, but also in the one of the Romanian ethnics, in general. The volume is a painting of postwar years, the years of transition to communism. Thus, the author describes the state of Jewish Democratic Committee and foresees its end since 1947, this Committee representing the communism and its subversions and not the majority of Jewish population more concerned by exodus than by the building of the socialism. Anti-Semitism grows also in the postwar period and the idea that the Jews are helped by Americans threatens a lot of them. Also, Joint is seen with negative eyes. The communism is seen by the author as a "moral annihilation" in the continuation of physical annihilation from Iași which had to be beared by the Jewish community.

The second volume of Emil Dorian entitled *Cu fir negru de arnici. Jurnal 1949-1956/ With black wire of arnics. Journal 1949- 1956* (Dorian, 2012) describes the life of the author, poet and doctor in communist Romania. In the first years of communism, the poet was active, as long as he could, as a clerk of Jewish community and of its leaders and he is aware, slowly, its more and more profound comunizatōn. The Journal is also a journal of his tryings as a poet, this ars poetica that it was so dear to him. He appears as a main intelectual of those times trying to escape by the cenzorship of the time, maybe also because of the fact he writes several books for children. It is a literary journal being made references not only a single time to the literature of the poet or the universal one, and also a journal of events with references to the political and cultural of the time. Slowly, the Jewish identity of the author, so unusual in the communist period, is replaced by the quality of progressist writer.

Carol Buium Beniamini, in the paper *Un sionist în vremea lui Antonescu și după aceea/ A Zionist in the time of Antonescu and after that* (Buium Beniamini, 1999) describes his activity as a Zionist. The author developed his activity in the most tensed period for the Jewry, before and after the Second World War in the framework of Zionist organisation Hašomer Hazair. A part of Jewry belived, with naivety, in the communist ideals, while the majority tried to emigrate in their historical country, making alia. Hašomer Hazair was one of the most numerous Zionist movements appeared after the war.

The memmoirs of Carol Buium Beniamini are reviewed by university professor Solomon Vaimberg PhD who describes the context in which he knows the author after the war, after the recreation of the organization Hašomer Hazair. In the same time, professor Solomon Vaimberg makes a portrait of the situation of Jews from postwar period, that were aspiring in spite of the difficuties existent, to emigrate in Israel: "For the regime, the Jews were becoming a minority hardly assimilated which did not frame nor by social origin among the privileges categories of the new order. The ones who dared to make requests for allay were severely sanctioned with the loss of working place, elimination from schools and universities, exclusion from the political life in general. Dissimulated

discriminated as “Zionists” or non- dissimulated in the framework of the measures named cynically of “improvement” of national composition, marginalized as “small – bourgeois”, pushed towards the status of some citizens of second category, the Jews were frustrated even of the perspective of promotion in their specific domains of activity”. (Apud Buium Beniamini, 1999: 14) Solomon Vaimberg considers that the Jews did not count themselves among of the favorite persons of communist regime, amongst the ones prejudiced by this regime. In what concerns Carol Buium Beniamini, this was detained together with other Zionists from the movement Haşomer Hazair in the prisons Malmaison, Jilava and Văcăreşti in the period of antonescian regime (14 March 1942–august 1944). The leaders of Zionist movement, once liberated, contributed to the remaking of Zionist organizations after the war: Haşomer Haţair, Bnei Avoda, Mişmar. In a time when the movement of resistance against the fascism was reduced in Romania, the organization Haşomer Hazair plaied an important role.

Carol Buium Beniamini shows the main directions of action of the youth of the organization by describing his personal experience: “As a lot of other people, boys and girls, at the age of adolescence what kept us united as members of youth organization was the sincere friendship, the happiness of life, the songs, dances and trips; the youth ambiance; the discussions about <<the platonic love>> and the expectation of the ten commandments of the movement Haşomer Hazair. In the same time, we listened to the conferences, *sihot* in our dialect, about Freud and Adler, who tried to find the secrets of the consciousness and subconsciousness, the secrets of the human soul. We discussed and commented the problems of the evolution and of the revolutions which were on the basis of dialectic development of the society of history – since the French Revolution and until our days. We tried to deepen the profundity of the philosophy and of the historical determinism, discussing with passion about the personality in history. I did a huge effort to explain and to interpret the existance and development of Jewish people during the two thousands years of history of diaspora [...] We created the synthesis between Zionism and socialism whose culminant point must have been the achievement of a society based on equality and fraternity, deprived of the exploitation of man by the man: this ideal society was for us the kibbutz, built by us, in the country of our people, Israel”. (Buium Beniamini, 1999: 20)

In his Memories, Carol Buium Beniamini furnishes also a few documents which accuse by communist orientation the members of the movement Haşomer Hazair. The movement Haşomer Hazair organized several summer camps during the postwar period with the purpose of instruction of Zionist youth concerning the emmigration. :”The summer camp in the year 1945 was at Tazlău, in the Neamţ country; a few series of wooden cabbans – that served or were built to serve to the German army – they were used by us as shelter. The war ended before the end of the construction of cabbans. In the year 1946, the summer camp took place near Reghin, in Transylvania, in one of the palaces, almost in ruins, of some Hungarian nobleman, the owner of a great farm. The house was built in the middle of a beautiful park, pretty spacious to be the shelter of a few hundreds of young people şomrim”

In the year 1947, the movement of youth Haşomer Hazair knew an impressive development. In May 1947, I foreseen the participation of more than 1000 of adults. It must have found a sufficient space and pretty spatious to include us all”. (Buium Beniamini, 1999:129) In the end, the author emigrated illegally in Israel.

Serge Moscovici, in *Cronica anilor risipiţi (The cronical of dissipated years)* (Moscovici, 1999) describes his own life. Having Jewish origins, Serge Moscovici is an

interesting character that suffered before the war the consequences of anti-Jewish laws, being a witness of the pogrom from Bucharest in 1941, actionning as a communist in illegality before August 23, 1944. Dissapointed by the communists, after their installation to power, he helped the Zionist disidents to pass the boundary illegally. For his activity, he was involved in 1947 in a trial and, later, he emigrated illegally in France.

A very special writing is the memories of Arnold Schwefelberg, a Jewish intellectual who plaied a very important role in interwar period and even in the first years after the war, in the years of transition to communism, having the title *Amințirile unui intelectual evreu din România/ The memories of a Jewish intellectual from Romania*. (Schwefelberg, 2000) He was a juriste as a profession, he had been studying in Romania and abroad, close collaborator with W. Fildeman, he was a leader of Jewish Community from Romania, representing with success the prototype of exceptional Jewish intellectual, who imposed professionally and and at the level of community in the interwar period time. Son of a teacher, Schwefelberg inherited from the side of the family, aptitudes for study, having in the same time also an enterprising and organising spirit and he was less a religious Jews, as his father was. After exceptional studies in highschool, once arrived in Bucharest, Schwefelberg participated to the *Academy of commercial and industrial studies*, where he was a meritous student. He participated at the First World War, he fought on the front in the first line, getting at the end of the war, Romanian citizenship. He activated as a good Jew among the proeminent members of the Jewish Community from Romania, this community knowing also moments of tension starting with 1937, once with the coming to power of the government Goga-Cuza. During the legionary rebellion, Schwefelberg and his family is aggressed by a band of legginaries, but they escaped alive. Leon Volovici, in the foreword to the volume briefly characterizes the activity of Schwefelberg during the period of leadership of marchal Ion Antonescu: „During the years of the war, he was very active in the Jewish organizations of assistance of the Jews who lost their working places after the setting up of the legislation of Romanization of the employees from the enterprises; organizations of helping the refugees from Czechoslovakia; of the famillies of the victims of the pogrom from Iasi, of the deportees in Transnistria or of the returned from deportation; in the organization of some emigrations towards Palestina; in the salvation of some Jews from Hungary evadated on the eve of deportation and refugees in Romania”. (Schwefelberg, 2000: 14) At the end of the war, Schwefelberg launched Zionist activities and supported the emigration of Jews in Palestine (Israel), motif for which he is arrested by communists in 1952. After the eliberation from prison, he tried to adjust to the conditions from Romania. He writes his memories in the years '60 with an epilogue in 1973, being reflected from these memories a detachment from the life lived by Jews in Israel and an adaptation to the realities from communist Romania.

Șlomo Șitnovitzer in his book *Documentul autentic sau amintiri din închisorile comuniste din România (The authentic document and memories from communist prisons from Romania)* (Șitnovitzer, 2003) describes the years he spent as a Zionist disident in the communist prisons from Romania „at Jilava, Malmaison, Pitești, Caransebeș, Rahova”. (Șitnovitzer, 2003: 10) His arrestment happenned in 1950, during a trip to Bușteni when some individuals from the Security take him to Bucharest in order to make some verifications. Imprisoned, he describes the atmosphere from the prison asserting that the purpose of the interrogations “was to force, with any price, the interrogated person to acknowledge the accusations, namely the fact that he activated against the state order and, moreover, he was a spy [...]”. During the interrogations, the officer was trying also a

psychological pressure of threatening his victim, showing to him that he was not an ordinary prisoner, but “the great chief of the great organization Bather who had a severe military discipline being enough that me, the authoritarian chief and leader of this movement to push on a button so that the thousands of botanists to start a <<revolution against the state order>>. (Șitnovitzer, 2003: 18-19) About the enquettes of the Security the author asserts that their extreme form was the sending of the accused in the caves of the Security, genuine places of terror. In fact, the novel, a diary of the years spent into prison, mentions that: “They were times when the enquette <<was not advancing>> as the officers said, when they did not succeed to get out from you not only what they would have wanted, but not at least a part of it; and this after a period of months and months of days. Then they sent you down, in the caves of the Security with the slogan “you are going to stay there until you will die”. And they were leaving you there for a while with the hope (of the interrogator) that passing the time you will get tired and, finally, you will decide to speak out. It was a kind of punishment from the side of interrogators because, normally, everybody wanted to finish this terror, to be judged and sent to prison where the life was a little more bearable”. (Șitnovitzer, 2003: 43) But not all the days were so terrifying. The prison was also a good opportunity for socializing and for the discussions with the colleagues from the cell.

In the work, *Speranțe în întuneric. Memorii (Hopes in the dark. Memories)*, it is shown that Valentin Saxone (Jew) was deprived of his right to exert his profession of lawyer at April 20 1948, fact that the author is explaining by “the reason that it was pursued the suppression of the right for the fascist elements of not exerting this profession – they were set apart from the exercise all those they were not wanted by the communist regime, all those that were not regimented or they were not working – as I sad under the clothes of << long way comrade>>” (Saxone, 2004: 13-14). Ulterior they found out that he was pursued by a member of the Security which approached his family in his purpose. He was suspended from profession during the ten years. The author dedicates a chapter of his activity after August 23, 1944. The King Mihai abrogated the discriminatory existent measures during the regime of Ion Antonescu. The author is one of the initiators of the Group “Ideea” that was grouping several intellectuals who wanted, this way, to approach the Christian population to prevent the setting of Fascism and anti-Semitism. But the activity of the Group “Ideea” was of short time, because at the end of the year 1947 the Communist Party forbade the activity of political organizations with a cultural character. Another chapter is dedicated to the Romanian Popular Party and to the elections from 1946, when, together with a friend, Petre Ghiață “we started in the year 1944 to the creation of Popular Party of Peasants, denomination that changed later in <<Popular Romanian Party>>, not to be confounded with <<Social Peasants Party>> led by university professor Mihail Ralea or with <<National Party of Peasants>> led by Iuliu Maniu and Ion Mihalache, great, historical party, of which we tried to be different”. (Saxone, 2004: 47) Among the principles of the party on the bases they competed at the elections from 1946, was also “the firm devotion towards the Crown”. Not only once there have been made innuendos to “his bourgeois origins” and, from 1962 he was detained to Jilava under the accusation of counter- revolutionary and spy.

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## RETHINKING THE RELIGION FACTOR IN INTERNATIONAL RELATIONS

*Daniela BLAGA\**

**Abstract:** *Ever since Westphalia, after decades of hegemony of certain actors, after twists and turns of paradigms in domestic and foreign policies it is still not easy to draw clear lines between established and contending actors, social and religious divides, or essential elements in domestic affairs that can trigger changes in the international affairs. It is though a fact that the global reemergence of religion has happened and religion – moving closer to the centerstage of international relations – has created new vantage points for the media and academia. Religion is becoming essential in defining both domestic and foreign policy given the challenges posed in the contemporary global(ised) world. The states have remained sovereign in view of the domestic turmoils and migration waves, but scholars, politicians and practitioners of politics and International Relations can neither deny nor shake the effect that religion and religious movements (!) have in the international system. Do we have a sufficient basis to rebuilt theories of International Relations? This research attempts to display assumptions on the role of religion in International Relations.*

**Keywords:** *religion, IR, security, Islamism, revolution in Europe*

### 1. Does religion have a place in the International Relations (Theory)<sup>1</sup>?

To pinpoint the beginnings of the topic „religion and IR” is difficult. In the early 1990s religion was a topic indirectly addresses (not thoroughly analyzed) by IR scholars while discussing Constructivism. In doing so, theorists addressed religion in broader contexts like *society, culture, identity*. It was in 1993 when a groundbreaking thesis was published – Huntington’s *Clash of Civilizations* – and even Huntington did not address religion as a level of analysis but as part of the understanding of the term *civilization*. As the world was modernizing it was also secularizing. Religion was personal and the system of states and the understanding of international politics became secular. All the states that had molded after the Westphalian model paid little to no institutional attention to religion as it was such a personal in-house issue. History has proven that both modernization and secularization have experienced hiccups to the point of failure.

In 1998 two doctoral students of the London School of Economics queried whether religion should be part of the research agenda of IR. Their names are Fabio Petito and Pavlos Hatzopoulos and the conference titled *Religion and International Affairs* put

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<sup>1</sup> International Relations will be hereinafter referred to as IR (the discipline or the study of international relations, international affairs or foreign policy). We will use IR Theory to refer to the discipline called International Relations Theory.

them on the map for their „pathbreaking” research.<sup>2</sup> In IR, a truly secular area of study, religion could not be envisaged as a *person of interest* as it was regarded as a private and personal aspect of people’s lives. But the modern concepts of state sovereignty and non-intervention in the domestic affairs of another state were shattered with the earthshaking event that forcefully brought religion in the public sphere – the 9/11 terrorist attacks were officially and explicitly based on religious motivation. The *cuius regio, eius religio*<sup>3</sup> became one *former* principle that no longer could explain the interaction of states within the international system.<sup>4</sup> Hatzopoulos and Petito returned to the topic in 2003<sup>5</sup> with an edited volume addressing religion from multiple standpoints: international political theology, pluralism, multiculturalism, impact of faith on political conflict. Going one step further, Scott M. Thomas defines “the global resurgence of religion” as “the growing saliency and persuasiveness of religion, i.e., the increasing importance of religious beliefs, practices, and discourses in personal and public life, and the growing role of religious or religiously-related individuals, non-state groups, political parties, and communities, and organizations in domestic politics, and this is occurring in ways that have significant implications for international politics.” (Thomas, 2005: 26)

Notwithstanding its lack of initial interest, the subject of religion and its place in IR became suddenly current. The events of 9/11 were regarded to have some significance, but academics did not jump too high. Michael Cox wrote in 2002<sup>6</sup>:

*But, assuming that we can agree that 11 September was significant, that even the most simon-pure of academics should be concerned about thinking through its implications, and that the world out there might influence thought, what impact is 11 September likely to have on the research agenda of international politics?*

The question triggered debates and soon it was impossible to ignore. The effects of the 9/11 attacks have not been singular in changing the optics. The two subsequent wars in Afghanistan and Iraq brought new relevance to the place of religion in IR. The literature on religion and IR is now extensive and dynamic. The increasing participation of religious groups in domestic politics and the ever-increasing geopolitical activity and influence of the religious states triggered a niche of studies. „We live in a world that is not supposed to exist” (Thomas, 2007: 21) became the new representation of the current reality. The Western world at large and Europe in particular faces a crisis that does not truly have to do with religion singularly: identity is challenged by anarchy and the legitimization of violence.

<sup>2</sup> E-International relations (2013), Vendulka Kubalkova, *The “Turn to Religion” in International Relations*, accessible via: [http:// www.e-ir.info/2013/12/03/the-turn-to-religion-in-international-relations-theory/](http://www.e-ir.info/2013/12/03/the-turn-to-religion-in-international-relations-theory/) Accessed November 2016.

<sup>3</sup> Translated as *whose realm, his religion*, is a principle dating back to the Peace of Ausburg and consolidated by the Peace of Westphalia as the fundament for the new type of state that limits the influence of the Catholic Church over the domestic affairs of states.

<sup>4</sup> The proceedings of the LSE conference were published as a book *Religion in International Relations: The Return from Exile* (Petito, Hatzopoulos eds. 2004), later on published as a part of the Palgrave series Culture and Religion in International Relations, edited by Yosef Lapid and Friederich Kratochwil.

<sup>5</sup> *Religion in IR. The Return from Exile*, Palgrave Macmillan, 2003

<sup>6</sup> Michael Cox, “Paradigm Shifts and 9/11: International Relations After the Twin Towers”, *Security Dialogue* 33(2), available here: <https://www.prio.org/Publications/Publication/?x=2780#4>, retrieved on November 2016.



The issue of anarchy and the threats deriving from the new world order can be formulated in terms of how border between *us* and *others* are delimited, aspect which is profoundly connected to the way in which violence is legitimized. (Mansbach & Franke, 2001:56) It is a current belief that the sovereignty is the main obstacle for ensuring human rights and a fair treatment of civilians during war. (Mansbach & Rafferty, 2008: 176) The state offers a territorial base to establish and draw identity borders so that the distinction between the interior and the exterior could be supported, the borders telling who is inside and who is outside of the civic and moral obligations, the subject regaining ground in the political theory and global politics. (Mansbach & Franke, 2001:56) Cooper believes that we are living in a postmodern world where state rationale and the amorality of Machiavellian theories that had defined international relations in the modern era have been replaced by the moral conscience – currently, the national interest lies with being a responsible international citizen. (Cooper, 2002:13)

The perspectives of domination that were primordial to the study of international relations during the Cold War, realism and neo-realism, emphasized the structural limitations of the international society that impeded the normative vision pleading for a radical change. (Chandler, 2004:13) Anarchy may generate insecurity and a system of self-help, but at the same time it may not. Therefore, what is truly important is the construction of identities, and here another question requires answers: *To what extent ego identifies with alter?* Claiming that the effects of anarchy have nothing to do with the material base of power, but with the construction of intersubjective significations of this base, Wendt empowers the actors who have the power to choose to change their behavior and with this, there is no longer an issue with the amorality of the international politics. Everything depends on how anarchy is interpreted and how states define themselves against position and intentions. (Wendt, 1999:395) Wendt delegitimizes the anarchy condition of the international system as the cause for exclusion of the moral dimension from the foreign politics, arguing that states, in formulating their foreign politics directions, cannot invoke anarchy to justify promoting their selfish national interests while the fight for power is the only thing rational in the international system. With a similar approach to delegitimizing politics of power, Richard Ashley tries to include a *non-place* in the realm of international relations: he is preoccupied to deconstruct intellectual and political practices supporting the dichotomy of state and liberty in an anarchical society, bringing forth issues that affect the international society in a postmodern era. (Griffiths, 2007: 337)

There is nowadays a new consensus regarding the whole sphere of morality, and the old distinction between intern and international is no longer applicable. This change in approach resulted in a different prioritization of ethical or moral approaches in the theory of international relations. The fact that the international system legitimizes unacceptable actions at an internal level (such as religious persecution, or enhanced interrogations) is of utmost importance for the issue of human security.

Norris and Inglehart study the theory of secularization in modern times, overlapping the realities of our world on rather outdated theories.<sup>7</sup> They propose a thesis of existential security, based on religion, secularization and comfort: while secularization continues to spread in mainly the Northern hemisphere (the developed countries!), religion is increasingly losing social significance. In the South (less developed or underdeveloped

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<sup>7</sup> Inglehart, Ronald and Pippa Norris, *Sacred and Secular. Religion and Politics Worldwide*, Chapter four, p. 5, John F. Kennedy School of Government, Harvard University, Cambridge University Press, Available here: [https://www.hks.harvard.edu/fs/pnorris/Acrobat/Sacred\\_and\\_Secular/Chapter%204.pdf](https://www.hks.harvard.edu/fs/pnorris/Acrobat/Sacred_and_Secular/Chapter%204.pdf), last accessed in November 2016.

countries) communities turn to religion as a factor of existence. In their words, when people accumulate wealth they become more comfortable, therefore more secure and they do not feel the need for religion. The existential security theory argues that all European Western countries have experienced the decline in religion, except for the United States. On this note, there are studies that suggest that the Gallup organization's procedures temper with the results in the measurement of churchgoers and church attendance – it is believed that the questions may cue the respondents unintentionally or the population samples are picked randomly. (Woodberry, 1998) (Hadaway&Marler&Chaves, 1998:122-130) (Steensland & Park & Regnerus & Robinson & Wilcox & Woodberry, 2000:291-318) It is a fact, nevertheless, that in Europe the Christian religion (be it Catholic, Orthodox or Protestant) is going downstream. It is interesting to note that, with the Christian missionaries to other continents, Christianity has changed epicenters – it has shifted from Europe to Asia and Africa. It is the fastest growing religion, but not in Europe. With the migration waves, the religion in Europe may no longer be mainly Christian, and the concept that religion is a source of violence and has never brought peace has increasingly become more popular. Today more than ever, religion is seen to mobilize public opinion and undoubtedly plays a fundamental role.

## 2. Migration and society

Globalization brought about the migration phenomenon – not only it dislodged *the back-home society*, but also changed the face of the European societies, especially in the West. Europe is now, for the first time in its modern history, a continent of migrants. First and second-generation migrants struggle to find identity all-the-while being part of a closed community.

*„Religious diaspora communities are one of the most significant types of non-state actors in world-politics of the twenty-first century.”<sup>8</sup>*

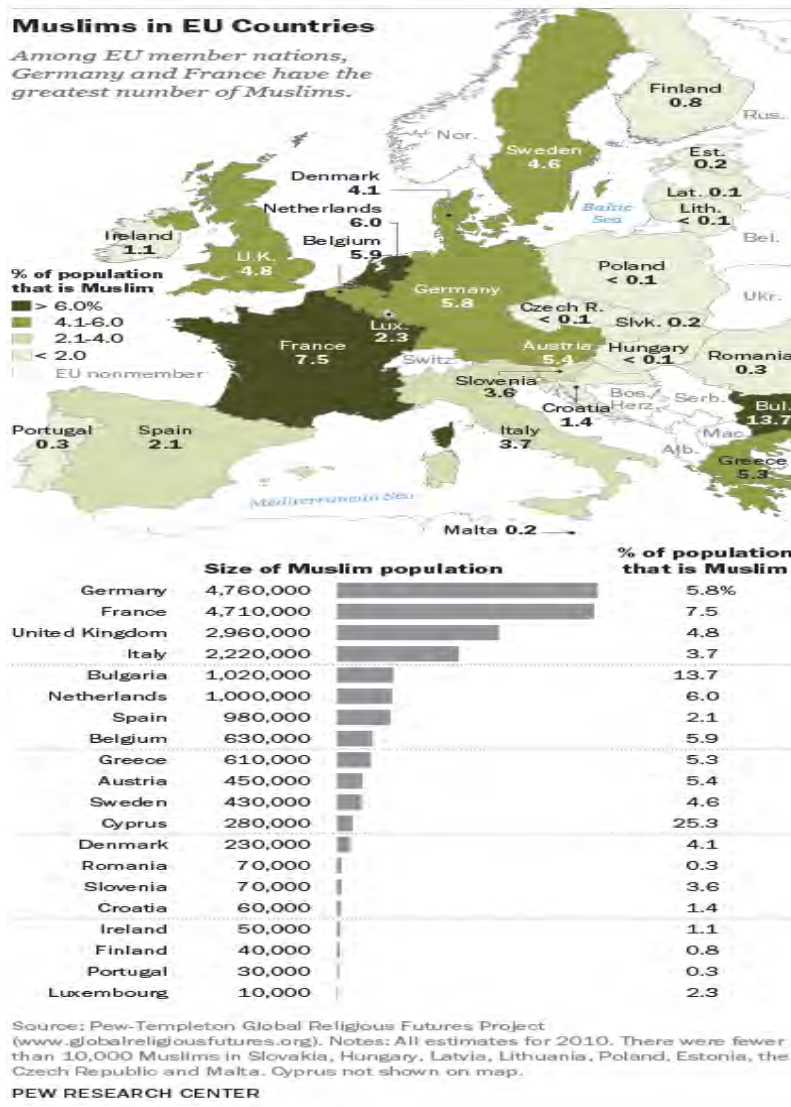
They contribute to the creation of transnational networks, impacting the now multiethnic and multicultural societies. In almost all Western European countries, the population of immigrants and their children approaches or surpasses 10%. (Caldwell, 2009: 8)

According to Caldwell, it is imperative to make the *sharp* distinction that much of this movement – the part that involves European moving to another European country – is not migration *per se*. It has to do labor and residential mobility, lack of borders, the Schengen space etc. This form of mobility (mainly professional) does not trigger issues of fitting in a society or pledging allegiance to which society. The immigration that has raised issues (mainly of identity and of security) is the immigration from non-European countries *and cultures*. Net migration into Europe from non-European countries is a record levels, pushing it towards an overcrowding of Europe by Muslim population. The problem that Europe has been facing is that ever since Islam has become a European reality it has constantly been challenging European traditions and customs. Sometimes these challenges are minor, like no alcohol during business meetings, sometimes are grave. Let us look at what happened in France in 2015-2016 – a ban of veil in schools, or the attempt at the burkini ban<sup>9</sup>. The fact of the matter is now that the multiculturalism that

<sup>8</sup> Thomas, Scott M., „Religions and Global Security”, in *ISPI - Quaderni di Relazioni Internazionali*, (Aprile 2010), available here: <http://www.ispionline.it/it/documents/Thomas.pdf>, last accessed in November 2016

<sup>9</sup> *Burkini ban: Why is France arresting Muslim women for wearing full-body swimwear and why are people so angry?*, august 2016, available here: <http://www.independent.co.uk/>

has been „Europe’s way of managing mass immigration requires the sacrifice of liberties that natives thought of as rights”<sup>10</sup>.



Source: <http://www.pewresearch.org/fact-tank/2016/07/19/5-facts-about-the-muslim-population-in-europe/>

Without people’s desire to take part in it, violence would not be possible. Violence is rationalized by the politicization of alterity. In the majority of modern states, the crimes motivated by belonging to a certain group (ethnic, religious, racial etc.) are tried as aggravated offenses. Things change in the public or political discourse of decision makers and of academic scholars (positivist discourse) where the term „ethnic conflict”, or „war”, is often regarded as a regular phenomenon of the social life. The question is when

[news/world/europe/burkini-ban-why-is-france-arresting-muslim-women-for-wearing-full-body-swimwear-and-why-are-people-a7207971.html](https://www.pewresearch.org/fact-tank/2016/07/19/5-facts-about-the-muslim-population-in-europe/)

<sup>10</sup> *Ibidem*, p. 11.

such „race crimes” turn into ethnic conflict, and vice versa? By avoiding to assume the idea that identity is not the firstly and inextricably linked to the nation-state there is a fundament for imagining other possible substantiation for collective identity.

According to Conrad Hackett, a demographer focusing on religion at Pew Research Center, as of 2016 there are five main facts about the Muslim population in Europe<sup>11</sup>:

1. Of all EU members, Germany and France are house for the largest Muslim populations. As of 2010: 4.8 million Muslims in Germany (5.8% of the country's population) and 4.7 million Muslims in France (7.5%).

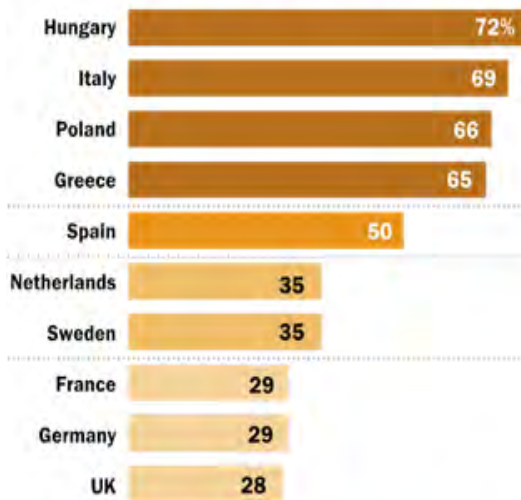
2. The Muslim share of Europe's total population has been increasing steadily. It grew with 1% per each decade and it is expected to reach a total of 8% in 2030. By comparison, in 2010 the Muslim share of Europe's total population was 6%.

3. Muslims are younger than other Europeans. The average age of Muslims in 2010 was 32, while the Europeans had an average of 40.

4. Views of Muslims vary widely across European countries. A Pew Research Center survey conducted in 2016 in 10 nations shows that negative views are predominant in the eastern and southern Europe. The western Europe was more favorable in their ratings.

### Views of Muslims more negative in eastern and southern Europe

*Unfavorable view of Muslims in our country*



Note: In Poland, question was asked of a subsample of 686 respondents.

Source: Spring 2016 Global Attitudes Survey, Q36c.

PEW RESEARCH CENTER

Source: <http://www.pewresearch.org/fact-tank/2016/07/19/5-facts-about-the-muslim-population-in-europe/>

<sup>11</sup> <http://www.pewresearch.org/fact-tank/2016/07/19/5-facts-about-the-muslim-population-in-europe/>, accessed in November 2016.

5. As of 2010, the European Union was home to about 13 million Muslim immigrants. In Germany, the immigrants came mostly from Turkey, Iraq, Kosovo Bosnia-Herzegovina and Morocco. In France the Muslim arrived from their former colonies of Algeria, Morocco and Tunisia.

There are reasons why Europe's Third World immigrants do not follow the same demographic pattern that the European did. While the European population registered a fall in their demographic, the Muslim culture is full of messages in favor of procreation: „*Get married, for I will boast of your great numbers before the nations.*” (Ibn Majah, I:599)<sup>12</sup> With welcoming arms, Europe seems to forget that throughout history the more advanced cultures have a long track of underestimating their vulnerability to less advanced, primitive ones. With the numbers, immigrants bring disorder and crime. Mary Kaldor (Kaldor, 2006) believes that the new wars have in common the fact that they address the states security aiming to seize control by the opposition groups who in turn try to push their own definition of identity.

Religion tends to be treated as static, unchanging, monolithic. The experience of recent years has shown that religion is fluid and changing. The 9/11 events brought back the stato-centric approach and reiterated the state's weakness against non-state actors. The proximity of attacks and of armed violence against the rule of state in these circumstances have reinforced the priority in international relations and in the debates on security; state borders are again brought into discussion as a barrier against threats of social, civil, political nature, from the inside or outside. Migration, in fact, has a lot to do with terrorism and this, combined with the free movement of people, makes it difficult to fight.

### 3. Terrorism and society

What causes terrorism? It is natural to assume that it is a direct or indirect consequence of politics and religion. For example, the bombings of Madrid (2004), credited to Al-Qaeda, are linked to the Spanish support of American invasion of Iraq and soon after, Spain ordered their troops out of Iraq. The 7/7 London bombings (2005) claim the same reason, the war in Iraq, but on the list of grievances mentioned in his suicide video by Mohammad Sidique Khan<sup>13</sup> it was also Britain's involvement in the occupation of Afghanistan and British support for Israel. „*Terrorism is only one face of Muslim self-assertion in recent decades, the self-assertion not just of a religion, but of a people.*” (Caldwell, 2009: 225)

But how is that people kill in the name of faith, in the name of God? How can people practice cruelty in the name of God's compassion? We are social animals (*zoon politikon*) and we survive in groups. Darwin explained it in layman's terms that we work for the good of the group and the survival of the fittest will always happen. So, we are good and bad at the same time, depending on whose standpoint you ask. Members of the same faith will have a different standpoint, while non-believers will be deemed as *pagans, heretics, infidels* etc. Jonathan Sacks writes: „*Good and bad, altruism and aggression, peace and violence love and hate, are born together as the twin consequences of our need to define ourselves as an Us in opposition to a Them.*” (Sacks, 2016:43) To speak now about secularization of the modern history has lost its appeal. Peter. R. Neumann argues

<sup>12</sup> For more, see <https://sunnah.com/ibnmajah/9>, last accessed in November 2016.

<sup>13</sup> *London bomber video aired on TV*, 2 September 2005, available here:

<http://news.bbc.co.uk/2/hi/uk/4206708.stm>, last accessed in November November 2016.

that modern terrorism comes in four waves: anarchism, anti-colonialism, the new left and the religious wave (which are all self-explanatory), predicting that the next wave, the fifth, has come with the Islamic State. (Neumann, 2016)

In the summer of 2016, Europe was taken over by a new wave of terrorist attacks: the truck in Nice, the attacks in Germany (Wurtzburg and Ansbach), the beheading of the priest in Normandy, the stabbing of the two female police officers in Belgium (Charleroi). One year prior, in 2015, Europe had suffered from the worst terrorist attack in the last decade – the evening of 13 November 2015 when gunmen and suicide bombers attacked four different Parisian locations: a football game, a diner, a restaurant and a theatre. An initial tally after the attacks listed 130 people dead and hundreds wounded, with more than 100 in a critical condition.<sup>14</sup> Few had expected this kind of attack and furthermore, experts believed that the Islamic State (the group to which the attackers belonged) was neither capable nor interested in large-scale operations in the West. Their strategy was believed to be different, instead of externally coordinated operations like those carried out by Al-Qaeda, they preferred „lone wolves” operations – small-scale operations that did not require much planning ahead. We now know that the Islamic State had long started organizing their attacks, targeting Europe as a whole. These terrorist attacks showed how unprepared European security agencies were in the face of threat: nearly all attackers were European citizens who had left their homelands and joined the Islamic State in Syria. Neumann attributes the failures „of prediction and prevention” to the „lack of intellectual rigour in dealing with the jihadist threat”. (Neumann, 2016) „Despite years – if not decades – of fighting jihadist terrorism, Western decision makers are often baffled by the movement’s actions, its strategy and ideology.” (Neumann, 2016)

It is important to make the distinction between the concepts of *Islamism* (political Islamism) and *Islamic fundamentalism*. These are interconnected, but while fundamentalism is regarded like a sum of ideas or a theory, Islamism represents action, in other words a practical manifestation of fundamentalism. Fundamentalism is the tendency to oppose modernization, an allegiance pledged to fundamental values, structures and the way of life already in existence. Nowadays, the public opinion associates fundamentalism with Islam and reflects the resistance of Orthodox Islamists to all attempts to westernization, modernization and Europeanization of Islam under the influence of the modern world. The Islamic fundamentalism requires the organization of everyday life after the Sharia Law and the creation of a theocratic state.

Regarded from the inside (from their own standpoint), to be an Islamic fundamentalist has a different meaning than what the Westerner understands:

*To be a Muslim is to believe in the fundamental principles of Islam in their entirety. Moreover, the doctrinal principles of Islam are not to be studied theologically, metaphysically or philosophically. Their study is primarily a practical endeavor aimed at discovering the base on which an all-embracing system is to be erected for the benefit of humanity. Theory and praxis go hand in hand; knowledge is simply a prelude to social action and political engagement.*<sup>15</sup>

<sup>14</sup> *Paris attacks: What happened on the night*, available here: <http://www.bbc.com/news/world-europe-34818994>, last accessed in November 2016.

<sup>15</sup> Choueiri, Youssef, Routledge, 1998: “*The fundamental principles of Islam and the injunctions of its laws are one seamless garment woven by God for his creatures. Whereas Greek thought, particularly Aristotelian thought, asserted that we are political animals by nature, Islamic fundamentalism contends that the basic instinct of human beings is intrinsically religious. Religion is understood in this context to be Islam itself (see Islamic theology). Islam has its own*

The most eloquent manifestation of modern Islamic fundamentalism is the „wahhabism”<sup>16</sup>. In July 2013, Wahhabism was identified by the European Parliament in Strasbourg as the main source of global terrorism. Since the 1970s, with funds from Saudi charities *madrassas* (Wahhabi schools) were planted alongside mosques across the globe. Since the 1980s, *salafiyah* returned to the attention of the young Muslim generations. Salafiyah<sup>17</sup> is the ideology of primitive Islam, who seek social justice as well as the imposition of Koranic punishments. The movement has grown exponentially in the last decades, and it is associated with movements like Al Qaeda, Isil (also known as Islamic State, Isis, Daesh) and Boko Haram, which in turn are associated with extreme terrorist attacks like the ones in Beirut, Paris, Brussels and Lahore.<sup>18</sup>

Muslim's acceptance of Europe and of the European countries they live in can only be temporary, as in many European places already Muslim are pushing for free rein of Islam. In other words, the integration of Muslims in Europe will happen on Muslim's term. Ramadan is telling it plain and clear: „*only when Europe's ways are understood as Islam's will Muslims obey them. And if not, not.*” (Caldwell, 2009: 244-245) Caldwell concludes that Ramadan is warning the West that if it does not change in accordance with the Muslim wishes, „*violence will somehow befall it*”.

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*constant, immutable and clearly defined nature. Its underlying aim is to change the process of history and create a new human being, unfettered by subservience to other human beings or institutions.*”, published online here: <http://www.muslimphilosophy.com/ip/rep/H007>, last accessed in November 2016.

<sup>16</sup> „What is Wahhabism? The reactionary branch of Islam said to be 'the main source of global terrorism'", *The Telegraph*, 29 March 2016, available here: <http://www.telegraph.co.uk/news/2016/03/29/what-is-wahhabism-the-reactionary-branch-of-islam-said-to-be-the/>, last accessed in November 2016.

<sup>17</sup> „Prophet Muhammad said: *"The best of people are my generation, then those who come after them, then those who come after them". These first three generations that Prophet Muhammad testified that they are good and righteous are the Salaf. So the Salafites attach themselves to the Salaf. After we have known the meaning of 'Salaf' and 'Salafite' then we should bear two things in mind.*” in „What is the meaning of Al-Salafiyah?”, with Shaykh Al-Albani's answer available here: <http://www.ahlalheeth.com/vb/showthread.php?t=99626>, last accessed in November 2016.

<sup>18</sup> For a better understanding of what they are about, we will use *The Telegraph's* list of FAQs which is short and concise, and provides some clarification for the Westerner: „**What is Isil?** An Islamic extremist group controlling territory in Syria and Iraq; **What is it called?** In the West, the group is usually known as Isil (Islamic State of Iraq and the Levant) or Isis (Islamic State of Iraq and Syria). In June, the militants said they wanted to simply be called Islamic State in recognition of the self-declared caliphate; **What about 'Daesh'?** Daesh is an abbreviation Dawlat al-Islamiyah f'al-Iraq wa al-Sham, and is the derogatory name used by many Muslims for Isil. Following the Paris attacks, the French government is now using this term; **What are its aims?** A worldwide Islamic caliphate - a religious government without borders; **What terror attacks has it carried out?** Isil has claimed responsibility for the Paris attacks of 13 November 2015, the explosion of a plane travelling from Egypt to Russia, and the individual killings of Western hostages, including James Foley and Alan Henning; **How is the group funded?** Looting, extortion and the possession of oilfields, providing an estimated £1.8m in revenue per day; **How much territory does Isil control?** An area of the Middle East that is roughly the size of Belgium; **Where is it based?** Isil's HQ is understood to be in the city of Raqqa, Syria.”. For more information see „What is Wahhabism? The reactionary branch of Islam said to be 'the main source of global terrorism'", *The Telegraph*, 29 March 2016, available here: <http://www.telegraph.co.uk/news/2016/03/29/what-is-wahhabism-the-reactionary-branch-of-islam-said-to-be-the/>, last accessed in November 2016.

„Under the circumstances, to raise the question of reciprocal obligations, or to ask what Islam will „contribute” to the Western society, is off the subject. To a thinker such as Ramadan, it is an impertinence. What Islam will contribute to the West is Islam.” (Caldwell, 2009)

### Conclusions

Does religion have a place in the International Relations? We would say it does. It definitely does in the small caps international relations. Religion is not *the* factor that triggers decisions, policies or foreign politics but it is one of the main ones. It is a fact that the global reemergence of religion has happened and religion – moving closer to the centerstage of international relations – has created new vantage points for the media and academia. Religion is becoming essential in defining both domestic and foreign policy given the challenges posed in the contemporary global(ised) world. The states have remained sovereign in view of the domestic turmoil and migration waves, but scholars, politicians and practitioners of politics and International Relations can neither deny nor shake the effect that religion and *religious movements* (!) have in the international system. Do we have a sufficient basis to rebuilt theories of International Relations? Possibly. Maybe. We are now in a period similar to the one post-9/11 in terms of shifting paradigms. Maybe we need more time, or more events until scholars and analysts can draw clear lines or find clear spot-on answers to international issues.

The issue of anarchy and the threats deriving from the new world order can be formulated in terms of identity, of the difference between *us* and *others*, of where we draw borders. This aspect is profoundly connected to the way in which violence is legitimized. In the recent years violence and terrorism have found new house in Europe with the new Muslim migration wave. It is a current belief that the sovereignty is the main obstacle for ensuring human rights and a fair treatment of civilians during war. The state offers a territorial base to establish and draw identity borders so that the distinction between the interior and the exterior could be supported, the borders telling who is inside and who is outside of the civic and moral obligations, the subject regaining ground in the political theory and global politics. But our world lies on moral conscience, so currently, the national interest lies with being a responsible international citizen.

The perspectives of domination that were primordial to the study of international relations during the Cold War, realism and neo-realism, emphasized the structural limitations of the international society that impeded the normative vision pleading for a radical change. Anarchy may generate insecurity and a system of self-help, but at the same time it may not. Therefore, what is truly important is the construction of identities, and here another question requires answers: *To what extent ego identifies with alter?* Claiming that the effects of anarchy have nothing to do with the material base of power, but with the construction of intersubjective significations of this base, everything depends on how anarchy is interpreted and how states define themselves against position and intentions.

There is nowadays a new consensus regarding the whole sphere of morality, and the old distinction between intern and international is no longer applicable. This change in approach resulted in a different prioritization of ethical or moral approaches in the theory of international relations.

Religion tends to be treated as static, unchanging, monolithic. The experience of recent years has shown that religion is fluid and changing. The 9/11 events brought back the stato-centric approach and reiterated the state's weakness against non-state actors. The proximity of attacks and of armed violence against the rule of state in these circumstances



have reinforced the priority in international relations and in the debates on security; state borders are again brought into discussion as a barrier against threats of social, civil, political nature, from the inside or outside. Migration, in fact, has a lot to do with terrorism and this, combined with the free movement of people, makes it difficult to fight. The difficult task lies now with the scholars and the decision makers to identify the solutions, or better said the *compromises* with which everybody at the negotiating table might be temporarily satisfied.

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## Nagorno – Karabakh Conflict and its Implications for Citizens

*Emilia Nicoleta SCHIOP\**

**Abstract.** *In the last period the main subjects were crises in Europe (the economic crisis, the crisis with Russia - tensions between Russia and Ukraine after the annexation of Crimea and economic restrictions for Russia in relation with the European Union, the migration crises, Brexit, terrorism), the American election, the Syrian civil war, etc. But also conflicts from the Central Asia have impact on the geopolitics of the world.*

*In this article I will analyze the situation between Azerbaijan and Armenia (how it began, the economic relations between those states, the international context) and I will present interviews from both Azeris and Armenians to show how this conflict changed or not their opinions about it.*

*The subject is actual, the implications of the conflict could be seen today. The military conflicts in the area of Nagorno-Karabakh started in the 1990 and even they stopped, the effects are visible also today for citizens, for the economy between Armenia and Azerbaijan and for the international context. It is important to understand the last changes in the geopolitics of the Central Asia, that they could influence decision makers from neighborhood.*

*The purpose of this research is to study the context from different domains and the implications for citizens. The first objective is to present general information from that area, the second objective is to show how the conflict influenced the economy of both countries, the third objective shows the implication of other countries and the last one is about how the war changed opinions of the citizens.*

*The methods consist in description (for a general view), analysis (for a particular view) and interviews for the practical part of the research. I made the interviews for Azeris and Armenians to see how they were affected. They were in number of six. There were anonymous, with an exact number of questions and the audience was randomly selected. The interviews were semi-structured and explanatory.*

**Keywords:** *Azerbaijan, Armenia, conflict, interviews, context.*

### 1. Context:

Nagorno-Karabakh denotes a mountainous region, with an area of approximately 4,400 km<sup>2</sup> in western Azerbaijan, inhabited by Armenians. The self-proclaimed state, Nagorno-Karabakh, not recognized by any other state in the world, it is part of Azerbaijan, but it is an autonomous region. Over time, there have been a series of bloody fighting between Armenians and Azerbaijanis. The conflict is not fully resolved even today, for which falls into the category of frozen conflicts in the former Soviet Union, along with those in Transnistria, Abkhazia or South Ossetia. In the first map it could be seen where is located Nagorno-Karabakh.

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**Fig. 1.** Map with Nagorno-Karabakh

**Source:** Jewish News Service, <http://www.jns.org/latest-articles/2016/4/20/unpacking-the-nagorno-karabakh-conflict-and-its-ripple-effect-on-israels-region#.WH58aNR97Gg>=

The territory was divided between the Armenian military forces and the Azerbaijani military forces, as it could be seen in the second map.

All these conflicts, now frozen, aimed at creating and maintaining tensions between different ethnic groups in order to increase Russian influence in regions. In Nagorno-Karabakh everything started after the Bolsheviks from Russia. In 1923, following a policy of destabilization of states that made up the USSR, Soviet leaders decided to form the Socialist Republic Azerbaijani Nagorno-Karabakh Autonomous Region, whose main population was Armenian.

The war in Nagorno-Karabakh began in 1988, when Armenians in the region have claimed territories which were part of the Soviet Socialist Republic of Azerbaijan. After the Soviet Union collapsed in 1991, former Soviet republics, including the two Caucasus republics obtained their independence. Since then, residents of Armenian origin in Nagorno-Karabakh backed by Armenia, proclaimed independence and his intensified fighting in the region. Armenia, which has always acted as an autonomous territory, sent troops to fight against Azerbaijanis.

The war ended in 1994, resulting in the occupation by Armenia of Nagorno-Karabakh and the consequences of the war was quite serious: tens of thousands of deaths, mostly Azerbaijanis, hundreds of thousands of refugees from both ethnic groups forced to leave their homes and to live in poverty. Armies and the separatist region of Armenia continues to occupy an important part (about 20%) of the territory of Azerbaijan. Although, the conflict is considered frozen since the war so far, about 3,000 people have died in ambushes.

The situation in the southern Caucasus has not yet found the answer, the autonomous region wants independence, but it is unlikely that it will get in the near future. On the other hand, Azeri leaders have threatened that if Armenia will not withdraw troops from the region, they would act with violence. With the help of significant revenues from oil, Azerbaijan increased its defense budget. Armenia has a smaller budget than its neighbor.

**Fig. 2.** The Nagorno – Karabakh conflict

- Azerbaijani territory occupied by Armenian military forces
- Armenian territory occupied by Azerbaijani military forces
- Nagorno-Karabakh
- Territory of Nagorno-Karabakh occupied by Azerbaijani military forces

**Source:** The School of Russian and Asian Studies, <http://www.jns.org/latest-articles/2016/4/20/unpacking-the-nagorno-karabakh-conflict-and-its-ripple-effect-on-israels-region#.WH58aNR97Gg=>

Caucasus, by its position between Russia and the Islamic world, has been under the influence of several regional powers. Regarding the Nagorno-Karabakh conflict, the Soviet Union, and then Russia, has supported the Armenians religion, but the Azeris, who are a population of Turkic Muslim, found an ally in Turkey. Moreover, the rich resources of oil and natural gas on the territory of Azerbaijan made major geopolitical actors, such as the US, EU, China or Iran to show a particular interest in this conflict.<sup>1</sup>

## **2. Economic relations between those two countries:**

Azerbaijan uses its energy resources to procure arms. Armenia is supported by Russia, the economic relations between them were close. As a result of the armed conflict, the economic relations between Armenia and Azerbaijan.

Azerbaijan has rich natural resources of oil, natural gas, gold, aluminum, etc. Among the favorite of all marine products we can include different varieties of caviar and fish prepared according to traditional recipes. Also, agriculture, natural resources and trade which in time became extremely active, Azerbaijani decisively influenced civilization.

<sup>1</sup> T. Mățău, "Conflictul din Nagorno-Karabakh" in *Geopolitics.ro*, 2012, <http://geopolitics.ro/conflictul-din-nagorno-karabah/>, accessed in 16.11.2016.

The vast majority of energy is produced from imported fuel, including gas and nuclear fuel (for nuclear power only) in Russia, the main source of domestic energy is hydroelectric. Small amounts of coal, oil and gas have not yet been brought to the surface.<sup>2</sup>

As a former member, Armenia's economy suffers from the legacy of a centrally planned economy and the breakdown of the Soviet trade patterns of trade. Soviet investment in and support of Armenian industry have disappeared, so that few major enterprises are still in operation.<sup>3</sup>

### **3. The international context and expert opinions:**

EU Eastern Partnership was officially inaugurated on 7 May 2009. But after the enlargements of 2004 and 2007, the conditions on enlargement as an element of foreign policy have become less favorable. Negotiating framework contains many tools of the Community method, even if foreign ministers have a strong control.

EU relations: Armenia: there are good relations and consistent progress on partnership, cooperation was deepened.

Azerbaijan: are talks of starting a negotiation.<sup>4</sup>

On 28 May 1918, the Democratic Republic of Armenia declared its independence from the Russian Empire, but the state had a short existence, being annexed by Soviet Russia in December 1920 and incorporated on 4 March 1922. It regained its independence on 23 August 1991, in the political context of the collapse of the USSR. The first years of independence were marked by conflict in Nagorno-Karabakh region of Azerbaijan. Clashes in Nagorno-Karabakh, concluded by an armistice signed in 1994, led to break off diplomatic relations with Azerbaijan and Turkey.

Negotiations on the settlement of Nagorno-Karabakh, conducted under the auspices of the OSCE Minsk Group, co-chaired by USA, the Russian Federation and France, have not led to resolution of the dispute and the political dialogue between Yerevan and Ankara was taken in September 2008. On 10 October 2009 the Republic of Armenia signed two protocols with Turkey on normalization of bilateral relations, which are currently under ratification. Armenia is a member of the Council of Europe. Following the decision of Armenia's accession to the Customs Union, President Serzh Sargsyan announced on 3 September 2013 that the EU has not initialed the Association Agreement with Armenia at Eastern Partnership Summit in Vilnius on 28-29 November 2013. On December 24 2013 in Moscow, Armenia signed the Roadmap for joining the Russia-Belarus-Kazakhstan. Also, Armenia joined the Eurasian Economic Union on 10 October 2014.

Azerbaijan is an important ally for the US. The only country that has borders with both Iran and Russia has angered their neighbors after it faced the United States.

For avoiding a democratic deficit in Azerbaijan, the strategy of President Ilham Aliyev to strengthen a strong middle class has its merit: if they would force reforms before they have a solid middle class, they would put the fate in the hands of Iran and Russia, that have no idea about democracy.

While Azerbaijan is oriented towards the West, Armenia has close relations with Russia. Indeed, the Armenians are probably the only who would vote to move their country toward Russia rather than to the West.<sup>5</sup>

<sup>2</sup> G. Bolocan, *Dicționar rus - român*, București: Editura Științifică, 1964, p. 96.

<sup>3</sup> Fondul Monetar Internațional, *Rezervele Internaționale și Puterea de Schimb Valutar*, 2016, <http://www.imf.org/external/np/sta/ir/IRProcessWeb/data/arm/eng/curarm.htm>, accessed in 16. 11. 2016.

<sup>4</sup> European Council, *Eastern Partnership*, 2016, <http://www.consilium.europa.eu/en/policies/eastern-partnership/>, accessed in 17.11.2016.

#### 4. New forms of the conflict:

Earlier in the day, in December 2016, the ministry reported downing an Armenian drone in the Fizuli district.

The situation along the contact line of conflicting parts in Nagorno-Karabakh, deteriorated dramatically overnight to April 2, 2016 when fierce clashes began. Every part accuse the other other of violating the truce, so, on April 5, a ceasefire agreement was reached with Russia's mediation.

In a trilateral statement adopted on June 20 following a summit of Russian Armenian and Azerbaijani presidents in St. Petersburg with the purpose of eliminating the conflicts.<sup>6</sup>

#### Interviews:

I made the interviews for Azeri and Armenians to see how they were affected. They were in number of six. There were anonymous, with an exact number of questions and the audience was randomly selected.

#### 4.1. Azerbaijan:

##### 1. Taking into account your nationality what is your opinion about the conflict Nagorno Karabakh?

**First person:** *Nagorno Karabakh is Azerbaijani territory and its occupation by Armenian military forces is violation of international laws.*

**Second person:** *I would like to see the conflict solved during next years.*

**Third person:** *My opinion is of course to get back our territory - Nagorno Karabakh but with peace not war. There are a great number of innocent people, who were in their 18-20 , being killed from both sides during the conflicts. I want to finish this conflict as much as possible. Belive me if u come to Azerbaijan and Armenia and ask about war from mothers, none of them will reply that they accept their children being killed. Needless to say that war has unrepairable results.*

##### 2. Which are the reasons that cause the conflict and what exactly keeps the conflict alive, in a continuously developing form?

**First person:** *The main reason for beginning of the war is Russian Federation's wish of keeping Azerbaijan - a former Soviet Union country under control and use this conflict against Azerbaijan in order to satisfy its political interest in Caucasus region. Russian Federation cooperated with Armenian government in order to capture Azerbaijan's historical lands.*

**Second person:** *As we can see from the history, Armenian army by the help of the Russians attacked to our lands to occupy them. It is a bigger conflict and Armenians killed many Azeri people and families in 1992-93 and there are still living on the azerbaijaninan lands (you can find about it on internet). It is what makes the issue bigger.*

##### 3. Do you think that the government makes all the efforts to put an end to the war?

<sup>5</sup> Ministerul Afacerilor Externe, *Armenia*, 2016, <https://www.mae.ro/bilateral-relations/4511>, accessed in 17.01.2017.

<sup>6</sup> \*\*\*, 2016, "Azerbaijani servicemen down another Armenian drone in Karabakh conflict zone" in *Russian News Agency*, <http://tass.com/world/918851>, accessed in 17.11.2016.

**First person:** *Efforts of Azerbaijani government other than fully satisfying Russia's political interest are insufficient. Armenian government displays no interest in freeing Azerbaijan's territories.*

**Second person:** *Our government and our nation want to solve the conflict by peace but this is international politics and this conflict is not that much smaller, it is not just between Azerbaijan and Armenia, it is global problem and bigger countries interrupt.*

**Third person:** *When it comes to governmental efforts-after 1989-93 wars in 1994 Ceasfire signed between 2 countries but since 1994 armenian side has broken ceasefire many times as u have seen as well on April 2 when we were in Romania the conflict escalated. Nagorno Karabakh territory internationally recognized as a part of Azerbaijan.*

**4. Has the conflict made you see the Armenians differently? If yes, in what form?**

**First person:** *Armenian authorities propagated hostile attitude toward Azerbaijanians for a long period of time. Also Russian government used historical conflicts between Azerbaijani and Armenian people in order to ignite a new conflict between two nations. For this reason, Azerbaijani people developed a hateful attitude towards Armenian authorities most of which are former war criminals and terrorists including the President of Armenian Republic, Serj Sarkisian.*

**Second person:** *As we can see from the history Armenian army by the help of the Russians attacked to our lands to occupy them. It is a bigger conflict and Armenians killed many Azeri people and families in 1992-93 and there are still living on the azerbaijaninan lands (you can find about it on internet). It is what makes the issue bigger.*

**Third person:** *Yeah I see the Armenians in a different way but It does not mean that I hate or I consider them as my enemies. When I was abroad I tried not to engage with them that's all.*

**5. Do you believe that the conflict had an influence on you and your family? In what way?**

**First person:** *The conflict had had a profound impact on Azerbaijan society effects of which include difficulties arising from reaccommodation of about 1 million refugees from the occupied territories.*

**Second person:** *The conflict left a deep mark on our society. Thousands of refugees are not allowed to go back to their regions and we are certainly living on the war situation.*

**Third person:** *Conflict left mark both on me and society. Because i am the part of my society as well.If something happen to my citizens , if genoside were made against my people ,needless to say it left mark on me .*

**Fourth person:** *It s so deep topics that I can talk with your for long hours, is s soo sensitive topic for all Azerbaijanian.*

## **4.2. Armenia:**

### **1.From your point of view,what are the reasons that cause the conflict ?**

*Ethnic cleansings against Armenian minorities in Armenian ethnic enclave of Nagorno-Karabakh autonomous Soviet district, violent ethnic cleansing in Baku and Sumgait in the late 80's, however its roots date back to the early 20th century. Historians know it best.*

### **2.What exactly keeps the conflict alive,in a continuously developing form?**



*The conflict is alive, from my perspective, because of 2 reasons: a) the societies are deeply divided and demonize each other in a pattern of mirror effect theory. b) Azeri elite dictatorship is not willing to accept any compromises, neglecting both so-called Madrid and Kazan principles, which are based on common concessions, keeps making war-like announcements about taking back territories and even "historical Azeri city of Yerevan" etc.*

**3. Do you think that the government makes all the efforts to put an end to the war?**

**Armenian govt.:** *Practically, the recent history shows that the Armenian government is OK with the status quo paying the price of relatively small casualties (up to 30/year), not taking into consideration the 4-day war in April, because NK Republic is de facto a state with its comprehensive bureaucratic apparatus etc.*

**Azeri govt.:** *Azeri govt seems not to be so willing to solve the conflict, as occasionally using it as a tool to distract public opinion from domestic problems i.e. the economic crises due to fall in oil prices, political oppressions etc.*

**4. Has the conflict made you see the Azerbaijanis differently? If yes, in what form?**

*To be honest, the conflict had been there before I was born and, unfortunately, I haven't seen our countries in an environment other than hostile. I personally, tend not to generalize and see the people as a one homogeneous body. I know that there are both decent and warlike nationalist on both sides, people who want peace and don't hate the other day side and people who want total zero-sum victory for any price.*

**5. Do you believe that the conflict had an influence on you and your family? In what way?**

*Directly, I don't think there was a certain influence. However, taking into account that many of my friends serve in the army and keep the frontline in a warlike environment, it is emotionally impossible to stay emotionally uninfluenced, uninvolved.*

According to the interviews, it can be seen how the conflict affected citizens. For example, the first person from Azerbaijan is more affected by the conflict and the third is more open to the other part. The second person is more affected than the third, but less affected than the first. The fourth person from Azerbaijan is more impressed by the conflict and this is a reason for that her answer was overall, in a single question for all six questions. The Armenian is also impressed by the events, according to his answers. Those answers are also influenced by the birthplace of the citizens. For example, the first lives in a area with refugees.

Another thing that can be seen from the interviews is that they are not open to socialize with the other part. Interviews used by me were semi-structured: they could follow the questions and answer clearly to them, but they could also add other relevant information (first three interviewed and the Armenian) or they could feel free for a different opinion to the subject (the fourth interviewed). Also, interviews were explanatory, thru this method, they explained their point of view for the Nagorno-Karabakh conflict.

More or less, the conflict left a mark on people from the both sides.

The methods with interviews for this topic is new and useful. Currently there is not a national or international case study that contains all interpreted information (including interviews for this topic), there are only different information from different sources. This study in micro format wants to show points of view from the conflict more close to the citizens.

### Conslusions:

In this research I studied the Nagorno-Karabakh conflict and its implications for citizens. Firstly, I achieved the objectives reffered to description of the area (Nagorno-Karabakh, being between those two countries, is wondered by both) and to the historical dates of the military implications, to the economy (how it changed: for example, Azerbaijan uses its energy resources for armies), to the international context (for example, indirectly it postponed the negotiations with European Union and the purpose could be the lack of reforms) and to opinions of the citizens, the practical part, which is the most important in this paper.

For citizens it was a challenge and they hardly accept the citizens from the other country, according to the interviews. They don't want to socialize with them, only if they have to. They were affected in different ways, more or less and they all would like this conflict to finish with peace. The events made them to want to be well informed, which is a good thing. Even none of them had connection with the military domain, the topic left a mark on them, that maybe will also be on the next generations.

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## IDIOSYNCRASIES IN TRUMP'S FOREIGN POLICY DECISION MAKING

*Melania-Gabriela CIOT\**

**Abstract.** *The world order, as we all know, could come now to an end. The role of leaders and leadership will continue to be important, but in conditions in which, at global level, it will exert a competition without reporting to rules, norms, institutions.. The present article investigates the behaviour and the type of messages regarding foreign policy transmitted by the American President during his campaign and in his first month at the White House, aiming to identify his idiosyncrasies, and in this way, foreseeing the type of behaviour that US will have on this new International System.*

**Keywords:** *idiosyncrasies, foreign policy, decision making, prospective behavior.*

### 1. Introduction

We are living in a new phase of accelerated reorganization of International System, when values, norms and procedures are changing and they aren't necessarily replaced immediately.

In a very interesting article, Robert Kagan (2017) said that the world order, as we all know, could come now to an end. One of the indicated challenging forces are the "dissatisfied large and medium-size powers", which want to change the existing order dominated by US and its allies and partners, with the aim of gaining hegemony in their regions. The greatest challenger are China and Russia because of their powers in military, economic and political fields, and they intend to use them, but also because the regions where they plan to use the hegemony are historically characterized as "critical to global peace and stability" – Asia and Europe. At another level, Iran looks for regional hegemony in the Middle East and Persian Gulf, North Korea seeks control of the Korean peninsula, which will affect the stability and security of North-East Asia and ISIS and other radical Islamist groups which are trying to establish a new Islamic caliphate in the Middle East. That, also will have effects on the global order.

In this prospective opinion, we will have a world order dominated by five important global actors. This vision will take us back at the end of 19<sup>th</sup> century, when great powers were clashing over their sphere of interest. And this was the fertile soil for the two important world wars of the first half of the 20<sup>th</sup> century.

Regarding the role of the US, the above mentioned author appreciated that its role was critical. The American leading system is characterized by alliances at military and political level, especially in two "critical regions" of Europe and East Asia and this was the incentive for hegemony ambition of China and Russia. United States offered to these actors the chance to be participants and beneficiaries of the open international economic system, but this won't apply for political and strategic order. The end of the Cold War

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brought the growth of new democratic governments as a consequence of the falling of Soviet communism, which represented a threats for Moscow and Beijing, and every advance of democratic institutions, including the geographical presence close to their borders. And this was interpreted as a threats imposed by US - supported order and that made them hostile both to the order and to the United States.

Unfortunately, EU has missed the opportunity to become an important global player. It has to work on its reorganization at institutional level, at the relations between Member States and between EU and other global and regional actors, at decision-making process and on its leadership. At the end of informal summit of European leaders, from 3<sup>rd</sup> of February from Malta, Donald Tusk, the President of European Council, mentioned three important threats the European stability:

- new geopolitical situation: an increasingly assertive China, Russia's aggressive policy towards Ukraine and its neighbors, wars, terror and anarchy in the Middle East and in Africa (with radical Islam playing a major role) and worrying declarations by the new American administration all make our future highly unpredictable;
- internal situation: a rise of the nationalist, increasingly xenophobic sentiment in the EU itself;
- state of mind of the pro-European elites: decline of faith in political integration, submission to populist arguments and doubt in the fundamental values of liberal democracy ([www.consilium.europa.eu/en/press/press-releases/2017/.../03-tusk-press-remarks-malt...](http://www.consilium.europa.eu/en/press/press-releases/2017/.../03-tusk-press-remarks-malt...)).

Easily, we can see a common element in both appreciations - the stability, which seems to be the new important axe which will define the new world order. In this context, the role of the leaders and the quality of leadership will be very important.

The leaders' decisions are influenced by many factors. The psychological elements influence foreign policy decision making. Specialists bring to attention factors such as the personality and beliefs of leaders, leadership style, emotions, images, cognitive consistency, use of analogies, intelligence and how they influence decision making and the results expected (Ciot, 2014:182). These factors call into question the power of rational model (Mintz and DeRouen, 2010: 97). But this does not mean that decision makers are irrational (Mintz and DeRouen, 2010: 97), but rather, they are limited by their abilities to follow through all the stages of the rational model (Ciot, 2014:182).

Presence of idiosyncrasies (personal factors, social) (Campanale and Shakun, 1997: 13), influencing decision-making can lead toward more complex-realistic approaches of decision-making, different from the "classical" rational model. Fagen mentioned two styles of decision-making in foreign policy: calculated and emotional (Fagen, 1962: 214). Idiosyncrasies bring into foreign policy decisions-making process the personal mixture of internal and external factors that may influence the course of an action. The risk of considering idiosyncrasies in the decision-making process requires the consideration of more stringent criteria, according to norms, and the effort to be the same as, rather than be "yourself". This system is based on fear, ie to be trusted, and if the decision maker cannot be considered "reliable" because he is idiosyncratic and ethical, then not only the decision maker will suffer, but also those who will feel the results of the decisional process (Keys, 2003: 12).

## 2. Donald Trump – short personality presentation

If we have to find one to describe the personality of newly elected President of US that word would be *negotiator*. That means, broadly speaking, a goal-oriented person, who

will use all of the elements in his/hers advantage in order to accomplish the aims that he/she is following. This statement is sustained by the books that he was published before his running to presidency: *Trump: The Art of a Deal* (Donald Trump, Tony Schwartz, 2004), *Trump 101: The Way to Success* [Donald J. Trump (Author), Meredith McIver (Contributor), 2006], *Trump Style Negotiation: Powerful Strategies and Tactics for Mastering Every Deal* (George Ross, 2008), *Think Big: Make It Happen in Business and Life* [Donald J. Trump (Author), Bill Zanker (Author), 2008], *Trump Never Give Up: How I Turned My Biggest Challenges into Success* [Donald J. Trump (Author), Meredith McIver (Contributor), 2008], *Think Like a Champion: An Informal Education in Business and Life* [Donald Trump (Author), Meredith McIver (Contributor), 2010].

Donald Trump became the famous business negotiator from the world after the publication of his first book *Trump: The Art of a Deal* (2004), but that book does not explain how you could negotiate as Trump. In the book from 2008, his personal advisor, George Ross, exposes in details the way in which anyone could implement Trumps negotiation tactics and strategies, which brought him in the top of world business.

The eight important principle of Trump negotiations are:

- Build trust, friendship and satisfaction with the other side;
- Probe to learn what the other side wants, flush out weaknesses, and uncover important information;
- Be a master salesman: create bold solutions to problems and convince the other side they are getting more than they ever expected;
- Control the pace of the negotiation: use timing, deadlines, delays and deadlocks to your advantage;
- Harness the power of human nature: psychological negotiation tactics;
- Information is power: become *the* expert of the topic that your are negotiating;
- Keep multiple solution in mind: remain flexible and creative about what you need and want;
- Win through discipline: the deal book, we-they list, post checklist and other powerful planning tools (Ross, 2008:31-138).

By exposing these negotiation principles, we could identify some important elements of Trump negotiations behaviour: psychological approach, highly emotional, flexible and creative, and the bilateral approach of negotiations (we-they). These element scould predict his approach on foreign policy decision making: respect for other cultures (in order to build trust), bilateral approach (this will be a „little problem” for EU), a strong knowledge of a problem which will be negoatiated, but an emotional decision (highly unpredictable, with idiosyncratic elements).

We will see if these negotiation principles and strategies will be the same in political and diplomatic negotiations of President Trump.

Regarding his psychological profile, one of the bests analysis belonged to McAdams (2016), a very prestigious author, well-known for his fine profiling of American presidents (Reagan, Bush Jr.). His approach is from personality, developmental and social psychology points of view. In his article entitled „The Mind of Donald Trump” he identified the main characteristics of his personality, that will shape his presidency: narcissism, disagreeableness, grandiosity. Going deeper with the analysis, the author says:

*Trump seems supremely cognizant of the fact that he is always acting. He moves through life like a man who knows he is always being observed. If all human beings are, by their very nature, social actors, then Donald Trump seems to be more so—superhuman, in this one primal sense.* (McAdams, 2016).

We could assume that the central aim of Trump (also for the campaign) was to create a psychological profile of a man. Mc Adams analyzed his dispositions, cognitive styles, motivation and self-conceptions that will bring us important elements regarding his idiosyncrasies.

#### a) Dispositions

Having as starting point the Big Five theory of personality, McAdams will identify the presence of Extroversion, Neuroticism, Conscientiousness, Agreeableness and Openness. Higher scores on extroversion indicate greater happiness and broader social connections, on conscientiousness indicate greater success in school and at work, and on agreeableness indicate deeper relationships, on neuroticism, by contrast, indicate a risk factor for unhappiness, dysfunctional relationships, and mental-health problems. Many people tend to develop as more conscientious and agreeable, and less neurotic. The author noticed that Donald Trump shows a „sky-high extroversion combined with off-the-chart low agreeableness”.

Like other presidents, George W. Bush and Bill Clinton, Trump acts as an outgoing, exuberant, and socially dominant manner, being a dynamo—driven, restless, unable to keep still. A cardinal feature of high extroversion is relentless reward-seeking, in form of approval, fame, or wealth. By giving the example of the question that was asked Donald Trump in 1987 whether he would like to be *appointed* president of the United States, *rather than having to run* for the job, the answer was simple: “It’s the hunt that I believe I love.”. In other words, we may say that we are dealing with a hunter, who likes competition, who sees the others as prey, who likes chasing, and not at least, playing.

McAdams say that Trump’s agreeableness (caring, loving, affectionate, polite, and kind) seems even more extreme than his extroversion, but in the opposite direction. He loves his family, he is generous and fair-minded boss. But agreeableness regards an overall style of relating to others and to the world, with effects on the broad social reputation Trump appointed him as a „remarkably disagreeable person”, based upon a lifetime of widely observed interactions. This type of personality is described as „callous, rude, arrogant, and lacking in empathy”.

The tendencies toward social ambition and aggressiveness were evident early in his life. The emotional core of Donald Trump’s personality is anger: “As far as the anger is concerned, that’s real for sure. He’s not faking it,” told Barbara Res in *The Daily Beast* in February 1980. The author underlined that combined with a considerable gift for humor (which also could be aggressive), anger is the heart of Trump’s charisma - and anger characterized his political rhetoric.

Dispositions provide clues to a president’s decision-making style. Extroverts tend to take high-stakes risks and people with low levels of openness rarely question their deepest convictions. As a real-estate developer, we can say that he has taken big risks, and, as a result of the risks he has taken, he build luxurious urban towers, gained a personal fortune (billions) which brought him big psychic rewards. So, he takes risky decisions. We can say that it is possible that President Trump will put efforts in his trying to deliver big payoffs (trying to *Make America great again* - as his campaign slogan says).

Because of his high level of openness (affirmed also in his negotiating principles) he will be more creative and pragmatic as decision maker, being able to switch positions easily, maybe leaving room to maneuver in negotiations with Congress and foreign leaders. But risky decision could bring him an emotional payoff.

But the „wild card” – as McAdams (2016) says – is his lack of agreeableness:

*We might predict that Trump's style of decision making would look like the hard-nosed realpolitik that Nixon and his secretary of state, Henry Kissinger, displayed in international affairs during the early 1970s. (McAdams, 2016).*

People low in agreeableness are typically viewed as untrustworthy. It is believed that today all politicians lie, or, at least, dissemble, and Trump make no exception from that, more he appears extreme in this regard.

The author concludes that:

*Donald Trump's basic personality traits suggest a presidency that could be highly combustible. One possible yield is an energetic, activist president who has a less than cordial relationship with the truth. He could be a daring and ruthlessly aggressive decision maker who desperately desires to create the strongest, tallest, shiniest, and most awesome result - and who never thinks twice about the collateral damage he will leave behind. Tough. Bellicose. Threatening. Explosive. (McAdams, 2016).*

#### *b) Mental habits*

In his first book, *The Art of a Deal*, Trump gives advices on how to enter in a negotiation, from a strenght position, so the concept of "the deal" represents what his personal schema („a way of knowing the world that permeates his thoughts") (Mc Adams, 2016). This element indicate the decision-making style.

Trump is focusing on personal relationships and one-on-one negotiating tactic, respecting a venerable political tradition. This indicates also a very strong idiosyncratic approach of his presidency. We have to have in our mind the fact that presidents are working within institutional frameworks that transcend the idiosyncratic relationships between people, as heads of state or members of Congress. McAdams (2016) says that the most-effective leaders maintain some measure of distance from the social and emotional fray of everyday politics and that they cannot afford to have particular relationship.

#### *c) Motivations*

A lot of psychologists (Gardner, 2016, Simon, 2016) used the same word to characterize Trump: narcissistic. But besides this feature, it is important to know what really motivates him. What are his goals?

McAdams (2016) noticed that the most important goal of a narcissistic person is to love themselves and to be loved by the others; the fundamental life goal is „to promote the greatness of the self, for all to see" – at this is a good explanation for the fact that Trump is putting his name on his building, his books, his university (where he plans to teach students how to become rich), TV shows.

From his biography we retain his need to excel, to be number 1. From school, from New York Military Academy for high school, from faculty he was popular among his colleagues, but he did not have any close confidants. He was remarked as being „the most competitive young man in a very competitive environment" (McAdams, 2016). Practically, it is impossible for him to show the kind of weakness and vulnerability that true intimacy typically requires (we can see that also from the titles of his books, linked in every occasions with the word *success*).

#### d) *Self-conception*

McAdams (2016) considers that one of the representation of American presidents comes from *narrative*, namely his stories about him, from where he exerts a moral elements and frames a nation-defining legacy. The personal life stories or narrative identities, in a psychological approach „explain how they came to be who they are”. Practically, it is about an unconscious, selective reinterpretation of the past and imagination of the future, from where we can see their view and understanding of national identity, priorities and progress.

And what about Donald Trump? What is his narrative? Can we find inspiration for a compelling American story?

Donald Trump grew up in a wealthy 1950s family with a devoted mother to her children and a father devoted to work. He was the fourth from five children, enjoyed a loving family environment. The Trump’s narrative, said by him, „expresses nothing like Bush’s gentle nostalgia or Obama’s curiosity, but a sense of danger and a need for toughness: The world cannot be trusted” (McAdams, 2016).

His father made the fortune from building, owning, and managing apartment complexes in Queens and Brooklyn. Donald, on weekends, occasionally accompanied him when he inspect buildings:

*On one such trip, Donald asked his father why he always stood to the side of the tenant’s door after ringing the bell. “Because sometimes they shoot right through the door,” his father replied. While Fred’s response may have been an exaggeration, it reflected his worldview. He trained his sons to be tough competitors, because his own experience taught him that if you were not vigilant and fierce, you would never survive in business. [...] “Growing up in Queens, I was a pretty tough kid,” Trump writes. “I wanted to be the toughest kid in the neighborhood.”* (McAdams, 2016).

Donald Trump graduated military school, which reinforced his sense of discipline and taught him how to manage with aggressivity, because –again -: world is a dangerous place.

If we take Jung’s archetypals (McAdams, 2016), Trump is the warrior, who has courage, discipline, and skill and whose central life task is to fight for what matters.

### **3. Donald Trump’s campaign and post-campaign messages regarding foreign policy – can we foresee his foreign policy decisions and behaviour?**

#### **3.1. Messages regarding foreign policy decisions**

The US foreign policy was described by the candidate Donald Trump, through the bilateral relationships. The main actors approach were: China, Russia, EU, Middle East, Germany, UK, France, Mexico, Israel, North Korea.



**Tabel no. 1:** State actors approached by Donald Trump's foreign policy view.

Actor	Date	Publication/Title/Link	Message
China	26.03.2016	BBC News, „Donald Trump and China: A complex relationship”, <a href="http://www.bbc.com/news/world-asia-china-35839782">http://www.bbc.com/news/world-asia-china-35839782</a>	„We talk about free trade. It's not free trade, it's stupid trade. China dumps everything that they have over here...."
	9.12.2016	Fortune, „Donald Trump Now Says the U.S.-China Relationship Must Improve”, <a href="http://fortune.com/2016/12/09/donald-trump-us-china-relationship/">http://fortune.com/2016/12/09/donald-trump-us-china-relationship/</a>	"One of the most important relationships we must improve, and we have to improve, is our relationship with China [...]. China is not a market economy [...]. They haven't played by the rules, and I know it's time that they're going to start." "You have the massive theft of intellectual property, putting unfair taxes on our companies, not helping with the menace of North Korea like they should, and the at-will and massive devaluation of their currency and product dumping [...] Other than that, they've been wonderful, right?"
	3.01.2017	Wall Street Journal, „China Shrugs Off Trump Twitter Jab on North Korea”, <a href="https://www.wsj.com/articles/donald-trump-chides-north-korea-china-on-twitter-1483406717">https://www.wsj.com/articles/donald-trump-chides-north-korea-china-on-twitter-1483406717</a>	„China has been taking out massive amounts of money & wealth from the U.S. in totally one-sided trade, but won't help with North Korea. Nice!"
	10.02.2017	China.org.cn, „China responds positively to Trump's greetings”, <a href="http://www.china.org.cn/world/2017-02/10/content_40260507.htm">http://www.china.org.cn/world/2017-02/10/content_40260507.htm</a>	- sent a letter to President Xi, wishing Xi and the Chinese people a happy Lantern Festival and saying that he looked forward to working with China to develop a constructive relationship that "benefits both countries."
Russia	15.08.2016	Time, „Donald Trump's Many, Many, Many, Many Ties to Russia”, <a href="http://time.com/4433880/donald-trump-ties-to-russia/">http://time.com/4433880/donald-trump-ties-to-russia/</a>	„Russian intelligence agencies have allegedly recently digitally broken into four different American organizations that are affiliated either with Hillary Clinton or the Democratic Party since late May. All of the hacks appear designed to benefit Donald Trump's presidential aspirations in one fashion or another. When asked about this, and his affection for Russian president Vladimir Putin, Trump said any inference that a connection exists between the two is absurd and the stuff of conspiracy. "I have ZERO investments in Russia," he tweeted after the Democratic National Committee was apparently hacked by Russia and the emails released by Wiki Leaks on the eve of the DNC convention to nominate Clinton as its 2016 presidential candidate. [...] But Trump's dodge—that he has no businesses in Russia, so there is no connection to Putin—is a classic magician's trick. Show one idle hand, while the other is actually doing the work."
	11.02.2017	The Economist, „Donald Trump seeks a grand bargain with Vladimir Putin”, <a href="http://www.economist.com/">http://www.economist.com/</a>	„Donald Trump appears to want to go much further and forge an entirely new strategic alignment with Russia. Can he succeed, or will he be the third American president in a row to be outfoxed by Mr Putin?

		news/leaders/21716609-it-terrible-idea-donald-trump-seeks-grand-bargain-vladimir-putin	<p>The details of Mr Trump's realignment are still vague and changeable. That is partly because of disagreements in his inner circle. Even as his ambassador to the UN offered "clear and strong condemnation" of "Russia's aggressive actions" in Ukraine, the president's bromance with Mr Putin was still smouldering. When an interviewer on Fox News put it to Mr Trump this week that Mr Putin is "a killer", he retorted: "There are a lot of killers. What, you think our country's so innocent?"</p> <p>For an American president to suggest that his own country is as murderous as Russia is unprecedented, wrong and a gift to Moscow's propagandists. And for Mr Trump to think that Mr Putin has much to offer America is a miscalculation not just of Russian power and interests, but also of the value of what America might have to give up in return."</p>
EU	29.04.2016	Reuters, „Trump's 'America first' speech alarms U.S. allies", <a href="http://www.reuters.com/article/us-usa-election-trump-idUSKCN0XO10R">http://www.reuters.com/article/us-usa-election-trump-idUSKCN0XO10R</a>	<p>„Donald Trump's first major foreign policy address alarmed American allies, who view the Republican front runner's repeated invocation of an "America first" agenda as a threat to retreat from the world.</p> <p>While most governments were careful not to comment publicly on a speech by a U.S. presidential candidate, Germany's foreign minister veered from that protocol to express concern at Trump's wording.</p> <p>"I can only hope that the election campaign in the USA does not lack the perception of reality," Frank-Walter Steinmeier said."</p>
	20.01.2017	Politico, „Donald Trump leaves Europe in the cold", <a href="http://www.politico.eu/article/donald-trump-leaves-europe-in-the-cold-in-inauguration/">http://www.politico.eu/article/donald-trump-leaves-europe-in-the-cold-in-inauguration/</a>	<p>"For many decades, we've enriched foreign industry at the expense of American industry, subsidized the armies of other countries, while allowing for the very sad depletion of our military," Trump said. "We've defended other nation's borders while refusing to defend our own. And spent trillions and trillions of dollars overseas, while America's infrastructure has fallen into disrepair and decay. If Trump's intention was to put Europe on notice, he succeeded.</p> <p>No region has benefited more from U.S. security guarantees since World War II than Europe."</p>
	28.01.2017	Euronews, „Is this tiny snail the reason Donald Trump hates the EU?", <a href="http://www.euronews.com/2017/01/28/is-this-tiny-snail-the-reason-donald-trump-hates-the-eu">http://www.euronews.com/2017/01/28/is-this-tiny-snail-the-reason-donald-trump-hates-the-eu</a>	<p>&lt;&lt;Donald Trump has made no secret of his dislike for the European Union. He has praised the UK's decision to leave the bloc repeatedly, characteristically describing it as a "wonderful thing". [...] „I had a very bad experience, I have — I had something when I was in my other world, I have something in another country and getting the approvals from Europe was very, very tough. Getting the approvals from the country was fast, easy and efficient. Getting the approvals from the group — I call them the consortium — was very, very tough."&gt;&gt;</p>

Middle East	2.03.2016	Aljazeera, „What would Donald Trump mean for the Middle East?“, <a href="http://www.aljazeera.com/indepth/features/2016/03/donald-trump-middle-east-160302065322917.html">http://www.aljazeera.com/indepth/features/2016/03/donald-trump-middle-east-160302065322917.html</a>	„Trump drew the anger of Muslims worldwide when he declared that he would impose a ban on Muslims entering the US. But he has also vowed to be "neutral" in negotiations between Israelis and Palestinians, a significant break from long-standing US foreign policy favouring Israel.”
	18.01.2017	The Telegraph, „Trump's Middle East policies will be driven by his instincts and loose relationship with reality“, <a href="http://www.telegraph.co.uk/news/2017/01/18/trumps-middle-east-policies-will-driven-instincts-loose-relationship/">http://www.telegraph.co.uk/news/2017/01/18/trumps-middle-east-policies-will-driven-instincts-loose-relationship/</a>	„the one thing we know with absolute certainty about Trump's policymaking process is that it rests on a firm belief that Donald Trump always knows best.[...] Trump's Middle East plan is, like many of his policies, contradictory and confusing. On Iran, he wants to scrap the nuclear deal but also strictly enforce it. He wants to crush Isil by reaching an agreement with Russia, to trade the survival of the Assad regime for a joint effort against Islamic State. But Russia isn't targeting Isil and neither is Assad. Trump also wants to limit Iran's malign influence in the region and combat Hizbollah – correctly identifying them as the number one threat to key US allies such as Israel, Saudi Arabia and the Gulf states. But a bargain that leaves Assad and his allies in place under a Russian umbrella is a seismic strategic victory for Iran, solidifying a Shia arc of influence and control stretching across Yemen, Iraq, Syria and Lebanon.”
	27.01.2017	The New York Times, „Trump Bars Refugees and Citizens of 7 Muslim Countries“, <a href="https://www.nytimes.com/2017/01/27/us/politics/trump-syrian-refugees.html">https://www.nytimes.com/2017/01/27/us/politics/trump-syrian-refugees.html</a>	„WASHINGTON – President Trump on Friday” closed the nation's borders to refugees from around the world, ordering that families fleeing the slughted from Syria be indefinitely blocked from entering the United States, and temporarily suspending immigration from several predominantly Muslim countries. In an executive order that he said was part of an extreme vetting plan to keep out <i>radical Islamic terrorist</i> ”, Mr. Trump also established a religious test for refugees from Muslims nations: He ordered that Christians and others from minority religions be granted priority over Muslims. <i>We don't want them here</i> , Mr. Trump said of Islamist terrorist during a signing ceremony at Pentagon. <i>We want to ensure that we are not admitting into our country the very threats our soldiers are fighting over seas. We only want to admit those into our country who will support our country, and love deeply our people.</i> ”
Germany	23.09.2016	Fox News World, „Activists in Germany rally against Donald Trump“, <a href="http://www.foxnews.com/world/2016/09/23/activists-in-germany-rally-against-donald-trump.html">http://www.foxnews.com/world/2016/09/23/activists-in-germany-rally-against-donald-trump.html</a>	„BERLIN – An activist group built a wall in Berlin featuring the face of Donald Trump, then tore it down in a rally to encourage Americans overseas to vote against the Republican presidential candidate.  The group Avaaz built the cardboard-block wall Friday at the landmark Brandenburg Gate, not far from the spot where former President Ronald Reagan once famously called for Soviet leader Mikhail Gorbachev to "tear down this wall."

			The ersatz wall carried an image of Trump and the message: "United to Stop Trump."
	12.11.2016	BBC News, „Trump's rude awakening for Germany”, <a href="http://www.bbc.com/news/election-us-2016-37936207">http://www.bbc.com/news/election-us-2016-37936207</a>	<p>„There is almost universal shock and horror here. Even Germany's foreign minister (who once described Trump as a hate speaker) could not bring himself publicly to congratulate him. One newspaper headline exclaimed "Oh my God!", another "We're in mourning". Another minister described the result as "a nightmare from which we can't wake up".</p> <p>A poll conducted by national broadcaster ARD found that the majority of Germans don't trust Mr Trump and that most believe his election will result in a deterioration of the transatlantic relationship.”</p>
	28.01.2017	Independent, „Donald Trump speaks to Angela Merkel - who he accused of 'ruining' her country”, <a href="http://www.independent.co.uk/news/world/americas/donald-trump-angela-merkel-refugees-latest-a7551346.html">http://www.independent.co.uk/news/world/americas/donald-trump-angela-merkel-refugees-latest-a7551346.html</a>	<p>„Despite criticising her policy on refugees, Mr Trump said she was his favourite world leader.”</p> <p>„President Donald Trump has spoken with German Chancellor Angela Merkel - the European leader whom he criticised for her policy of welcoming refugees from Syria.</p> <p>In 2015, Mr Trump tweeted that the German chancellor was “ruining Germany.”</p> <p>However, in 2016, Mr Trump picked Ms Merkel as his favourite world leader, despite his criticism of her position on refugees.</p> <p>“Well, I think Merkel is a really great world leader, but I was very disappointed [in] this move with the whole immigration thing,” he said in New Hampshire in September, according to New England Cable News.</p> <p>More recently, in an interview with Germany's Bild and the Times, Mr Trump again said he respected Ms Merkel but that she made a “catastrophic mistake” and referred to a Tunisian asylum seeker who drove through a Christmas market killing 12 people.”</p>
UK	21.03.2016	The Telegraph, „Donald Trump on Brexit: 'I believe Britain may leave the EU'”, <a href="http://www.telegraph.co.uk/news/worldnews/donald-trump/12200615/After-tomorrow-Donald-Trump-could-be-unstoppable.html">http://www.telegraph.co.uk/news/worldnews/donald-trump/12200615/After-tomorrow-Donald-Trump-could-be-unstoppable.html</a>	<p>&lt;&lt;Donald Trump has said he believes Britain may vote to leave the European Union.</p> <p>In what were believed to be his first public comments on Brexit, the front-runner for the Republican presidential nomination said Britain was "having a lot of problems" and his opinion was "based on everything I'm hearing".</p> <p>The comments came on a day when Mr Trump outlined some long awaited details of his foreign policy.</p> <p>He declared the United States should significantly reduce its involvement in Nato, questioning the need for it because allies were "doing nothing".</p> <p>Speaking in Washington Mr Trump said: "I think they (Britain) may leave the EU, yes, they're having a lot of problems.</p> <p>"I don't want to make a comment about the UK leaving but I think they may leave based on - I'm there a lot, I have a lot of investments in the UK and I will tell you that I think they may leave based on everything I'm hearing.”&gt;&gt;</p>

	15.01.2017	Independent, „Brexit will be a 'great thing' for UK, says Donald Trump”, <a href="http://www.independent.co.uk/news/uk/politics/donald-trump-brexit-the-times-interview-michael-gove-great-thing-a7528871.html">http://www.independent.co.uk/news/uk/politics/donald-trump-brexit-the-times-interview-michael-gove-great-thing-a7528871.html</a>	„Donald Trump has pledged to move “very quickly” in securing a trade agreement with Britain after Brexit and predicted that leaving the European Union would be a “great thing” for the UK.”
France	14.07.2016	Tweeter, <a href="https://twitter.com/realDonaldTrump/status/753728269019549696">https://twitter.com/realDonaldTrump/status/753728269019549696</a>	„In light of the horrible attack in Nice, France, I have postponed tomorrow's news conference concerning my Vice Presidential announcement.”
	24.07.2016	Mail online, „Trump says French and Germans could face 'extreme vetting' before entering US because their countries have been 'compromised by terrorism', <a href="http://www.dailymail.co.uk/news/article-3705400/Trump-says-French-Germans-face-extreme-vetting-entering-compromised-terrorism.html">http://www.dailymail.co.uk/news/article-3705400/Trump-says-French-Germans-face-extreme-vetting-entering-compromised-terrorism.html</a>	„Donald Trump has said people from France and Germany could face 'extreme vetting' before entering the United States because their countries have been 'compromised by terrorism'. In his nomination acceptance speech at the Republican National Convention, he said he wanted to crack down on immigration with countries where terror attacks were rife. He expanded on his aggressive policy on NBC's Meet The Press where he blamed France and Germany for letting terror flourish, saying: 'It's their own fault... They allowed people to come into their territory.' 'Here's my plan - here is what I want: Extreme vetting. Tough word. Extreme vetting,' he told Chuck Todd.”
	3.08.2016	The New York Times, „France's President says Trump's Excesses Make People Want To Retch”, <a href="https://www.nytimes.com/2016/08/04/world/europe/francois-hollande-donald-trump.html">https://www.nytimes.com/2016/08/04/world/europe/francois-hollande-donald-trump.html</a>	„PARIS- President François Hollande has said that <i>excesses</i> of Donald J. Trump made people <i>want to retch</i> , adding a scathing international voice to the chorus of those criticizing the Republican presidential nominee. Speaking on Tuesday to the French Presidential Press Association in Paris, Mr. Hollande noted the worldwide importance of the American campaign, calling it a <i>global election</i> and said a victory for Mr. Trump could herald a shift to conservative candidates in other countries.”
	20.01.2017	The Local, „France is still France whatever Donald Trump has said”, <a href="http://www.thelocal.fr/20170120/trump-president-france-is-still-france-whatever-donald-trump-might-say">http://www.thelocal.fr/20170120/trump-president-france-is-still-france-whatever-donald-trump-might-say</a>	<<Donald Trump said he wouldn't come to France because it's "no longer France". But despite the horror of terror attacks the French are still eating baguettes, drinking wine, going on strike... Donald Trump, who will be sworn in as the 45th US president later on Friday, has not been a friend of France in recent months. In February he provoked ire saying: "unfortunately France isn't what it was and Paris neither." And then in July, following the jihadist murder of a French priest, the newly elected president of the United States rammed the point home saying: "I wouldn't go to France. France is no longer France." "They won't like me for saying that," Trump continued, "but you see what happened in Nice. You see what happened yesterday with the priest, who is supposed to be a spectacular man. France is no longer France.”>>

Mexic	6.07.2015	Business Insider, „Donald Trump just released an epic statement raging against Mexican immigrants and 'disease'", <a href="http://www.businessinsider.com/donald-trumps-epic-statement-on-mexico-2015-7">http://www.businessinsider.com/donald-trumps-epic-statement-on-mexico-2015-7</a>	"the worst elements in Mexico are being pushed into the United States by the Mexican government." "The largest suppliers of heroin, cocaine and other illicit drugs are Mexican cartels that arrange to have Mexican immigrants trying to cross the borders and smuggle in the drugs. The Border Patrol knows this," Trump wrote. "Likewise, tremendous infectious disease is pouring across the border. The United States has become a dumping ground for Mexico and, in fact, for many other parts of the world."
	27.01.2017	CNN Politics, „Mexican president cancels meeting with Trump", <a href="http://edition.cnn.com/2017/01/25/politics/mexico-president-donald-trump-enrique-pena-nieto-border-wall/">http://edition.cnn.com/2017/01/25/politics/mexico-president-donald-trump-enrique-pena-nieto-border-wall/</a>	„The U.S. has a 60 billion dollar trade deficit with Mexico. It has been a one-sided deal from the beginning of NAFTA with massive numbers..." „If Mexico is unwilling to pay for the badly needed wall, then it would be better to cancel the upcoming meeting," Trump tweeted and in an earlier tweet he noted the US's trade deficit with Mexico and what he said were the American job losses caused by NAFTA."
Israel	20.03.2016	Politico, „Why Israel Loves Donald Trump", <a href="http://www.politico.com/magazine/story/2016/03/donald-trump-israel-2016-netanyahu-213748">http://www.politico.com/magazine/story/2016/03/donald-trump-israel-2016-netanyahu-213748</a>	<< The real estate mogul does not have a coherent position on the Israeli-Palestinian conflict, except to break with decades of Republican orthodoxy and announce that he would be "neutral." His campaign, run in the style of an authoritarian strongman, has earned him sharp criticism from American Jews, the largest Jewish community outside of Israel. And his backers include a former leader of the Ku Klux Klan who hopes Trump will "rehabilitate" Hitler's image, a statement that ought to give pause to anyone in Israel. Indeed, the big question looming over this week's American Israel Public Affairs Committee convention is just how many delegates will walk out during Trump's speech. >>
	9.02.2017	Haaretz, „Trump Reportedly Developing New Middle East Regional Strategy", <a href="http://www.haaretz.com/us-news/1.770891">http://www.haaretz.com/us-news/1.770891</a>	„Last week, Trump met in Washington with Jordanian King Abdullah, who became the first leader from the Middle East – and the second in the world – to spend time face-to-face with the new president. Abdullah warned Trump in the meeting about the consequences of moving the American embassy in Israel to Jerusalem, and of expanding Israeli settlements in the West Bank. Hours after that meeting, the White House put out a statement that included positive language on settlements from the point of view of the Israeli government (declaring that "existing settlements" were not "an impediment to peace"), but also asked the Israeli government not to expand or build new settlements. The report noted that Trump had "decided to slow down the embassy move" even before his meeting with the Jordanian King. Indeed, after promising numerous times during the campaign to move the embassy to Jerusalem, Trump has adopted a more cautious tone since entering the White House, saying instead that "it was too early" to discuss the idea, and that his administration hasn't yet reached

			<p>any decision on the matter. While the Israeli government has publicly called on Trump to fulfill his promise, Israeli officials – according to the report – made it clear in private conversations that this was not a top priority for the current Israeli government. [...]</p> <p>Trump has no emotional attachment to Israel. And his success has upended the long-held belief that Republican voters care deeply about a candidate's position on Israel.[...]</p> <p>Trump has already violated some of the tenets of the "special relationship." And while his tough-guy persona and hostility toward Muslims have earned him surprising support from Israeli conservatives, his ascent is also a source of unease for policymakers: It creates a schism between an Israel that needs to work with Trump, and American Jews who despise him—and it could end up undermining the marriage between the GOP's pro-Israel foreign policy elite and the broader Republican electorate."</p>
North Korea	15.06.2016	Business Insider, „Donald Trump on North Korean dictator Kim Jong Un: <i>If he came here, I'd accept him</i> ",	<p>&lt;&lt;Donald Trump said on Wednesday that he would welcome North Korean dictator Kim Jong Un to the US for negotiations if he were elected president.</p> <p>the presumptive Republican presidential nominee said that while he would not meet with the dictator in North Korea, Trump would host Kim for talks in the US, albeit without the fanfare of a traditional meeting.</p> <p>"If he came here, I would accept him," Trump said.</p> <p>"But I wouldn't give him a state dinner like China or all these other nations who are ripping us off."&gt;&gt;</p>
	12.02.2017	Independent, „North Korea missile test: Donald Trump and Japanese PM respond to 'intolerable' launch", <a href="http://www.independent.co.uk/news/world/americas/japan-prime-minister-shinzo-abe-respond-north-korea-missile-test-donald-trump-visit-a7575756.html">http://www.independent.co.uk/news/world/americas/japan-prime-minister-shinzo-abe-respond-north-korea-missile-test-donald-trump-visit-a7575756.html</a>	<p>„Mr Abe and President Donald Trump put on a united front against the provocative test with Mr Trump saying he stood behind Japan "100 per cent".</p> <p>Speaking at one of Mr Trump's golf resorts in Florida, Mr Abe said: "North Korea's most recent missile launch is absolutely intolerable. President Trump and I myself completely share the view that we are going to promote further cooperation between the two nations. And also we are going to further reinforce our alliance." [...]</p> <p>Mr Abe and Mr Trump's joint statement was made at the Jupiter golf club, which the US President owns."</p>

Trump's foreign policy decisions are seen from the way in which he approached different problems in campaign, eliminating the appeal to procedures, norms, institutions, organizations. He made the states and their leaders to ask how the relation with the US will evolve, but taking into account the system of interdependences and the following of the global interests by the US, he made a lot of leaders to raise questions regarding the measure in which norms, procedures and the rationality of decisions will be present in the next evolution of international relations.

But, the international policies will be the result of a moment will of a leader or a leaders association?

The manner in which the business-man Donald Trump approached the politics, centered on his own person, expressing the organization's interest sends us to the possible analysis of future decisional steps, to the future idiosyncrasies that might appear. We identified the presence of emotional (*Negative Emotions*), motivational (*Self-Realization, Responsibility*) and social perception (*Self, Others*) idiosyncrasies of Trump. (Ciot, 2014: 183, 192-193, 196-197, 199).

One thing we know for sure from his campaign: we have an idiosyncratic US leader, who will base his decisions on emotional ground. And other thing we saw for sure from his first month at the White House: his decisions are based on procedural manner, following the institutional procedures, meaning that the American system is maintaining its working path.

From foreign policy decision making process literature, we know that there is a specific American model, so-called *advisory system/counselling system*.

Many foreign policy decisions involve policy makers and their counselors (advisors) (Renshon and Renshon 2008: 518). Group counseling can shape foreign policy (and domestic) through the support offered in setting the agenda, information handling, framing alternative courses of information, control over information flows, preventing the filtering of conflicting and nonsupportive information, interpreting new information in a certain way and acting as "guardians" for the one they are advising. Advisory groups (of the president or the prime minister) can be powerful and influential (Mintz and DeRouen, 2010: 31).

Redd (2002: 335) studied how the counseling groups shape foreign policy decisions and concluded that decision-makers are sensitive to the political ramifications of their decisions. The aforementioned author states that the political information provided by counselors and advisors group influence information processing and external political choices. Preston (2001) shows that presidents with expertise in foreign policy (Eisenhower, Kennedy, George W. Bush) are less likely to rely on the advisory body when involved in a foreign policy decision-making process (Preston 2001, 15). For those with less experience in foreign policy (Clinton, Truman, Johnson), counselors are more important (Ciot, 2014:163).

The moment of Trump's appearance on American and global political scene coincided with the explosion of reality perception, going from emotionality and of digital communication, expressed mainly through social media (Tweeter). During the campaign, Trump expressed his personal beliefs and opinions on foreign policy with Tweet messages, based on his approach on the leader of a state.

We are living the phase of modification of International System and we are observing that this suits his personal style, but not necessarily to what we might believe that is the American national interest or global interest. We believe that American interest should be exerting of a rational, constructive global leadership and reaching more rapid an International System based on the norms of multilateralism, pluralism, of democracy, and of efficient management of interdependencies. But, up till now, Trump does not show the disponibility for this kind of direction, he preferes bilateralism based on emotional sincronicity elements manifested by certain leaders (see the way in which he speaks about Putin).

The fact that these kind of methods and senses, and that the methods of messages are coming from an American leader, taking into account the role that US placed in globality (economic, cultural, political, etc) made that the extension and intensity of the manners to be taken by other important leaders, in the direct communication with Trump,



but also in the social environment (see the case of President Hollande). Clearly, it can be seen that the technology has taken ahead the methods of XX<sup>th</sup> century, and that means that even diplomacy will appeal to other tools, and that this expanding of social media will go toward the interstate, interregional, interorganizational (regional and international) environments, denoting the necessity of new methods and language in diplomacy, in foreign policy and in international politics.

The change of International System will presume not only new types of interactions, but also another way of communication and relationship: electronic negotiations, e-diplomacy, cyber-diplomacy.

What is interesting regarding these new tools of diplomacy is the fact that even though the use of technology supposed to bring more rationality in decisions, we see more emotionality and more idiosyncrasies in our political leaders' decisions.

### 3.2. Messages regarding US foreign policy behaviour

During his campaign, a lot of questions has arisen regarding his platform, verbal and nonverbal language, his knowledge of issues, his view on foreign policy. On the basis of Trump's psychological profile we could now interpret his messages from campaign through these filters. We understood that his behaviour could be interpreted as a role that he is acting, so we will go on our assumptions on the emotional path. McAdams (2016) sustain the same:

*[...] he is always acting. He moves through life like a man who knows he is always being observed. If all human beings are, by their very nature, social actors, then Donald Trump seems to be more so—superhuman, in this one primal sense. (McAdams, 2016).*

During his campaign he was interacting with a lot of people – this is what he was doing for his whole career. Practically, he is in a *perpetuum mobile*, but it seems that he was enjoying it more than the other candidates. McAdams (2016) offered an example from his tweets:

3:13 a.m., April 12: “WOW, great new poll—New York! Thank you for your support!”

4:22 a.m., April 9: “Bernie Sanders says that Hillary Clinton is unqualified to be president. Based on her decision making ability, I can go along with that!”

5:03 a.m., April 8: “So great to be in New York. Catching up on many things (remember, I am still running a major business while I campaign), and loving it!”

12:25 p.m., April 5: “Wow, @Politico is in total disarray with almost everyone quitting. Good news—bad, dishonest journalists!”

It is hard to predict what sort of behavior he will have as a president. None foreseen that George W. Bush would someday launch a preemptive invasion of Iraq when he was running for election in 2000. And maybe, he would never have gone after Saddam Hussein if 9/11 had not happened. We will never know what kinds of decisions he might have made if these events not occurred.

As McAdams (2011) mentioned in his book, *George W. Bush and the redemptive dream: A psychological portrait*, the game-changing decision to invade Iraq was the kind of decision he was likely to make. When this sort of event happened, Bush took the opportunity for the invasion, and found a psychological motivation for it: to defend his

beloved father from enemies (think: Saddam Hussein) and in his own life story, where the hero liberates from oppressive forces (think: sin, alcohol) in order to restore peace and freedom. And, like Bush, Trump will try to make the big payoff in order to make America great again – his slogan. Because he is viewed as less ideological than most presidential candidates (on some issues he is conservative, on others liberal, or nonclassifiable), Trump may be able to be flexible, switching positions easily and leaving room to maneuver in negotiations.

An authoritarian personality like Donald Trump could offer the sense of adherence to traditional values and norms of society, submission to authorities seen as a reinforcement of those norms, and antipathy - to the point of hatred - toward those who challenge these norms. When individuals with conservative views fear that their way of life is being threatened, they may turn to strong leaders who promise to keep them safe – and that leader, through his messages was Donald Trump, when he promised to build a wall on the Mexican border to keep illegal immigrants out or when he promised to keep Muslims and other outsiders out. His messages appealed to the fear of contagion:

*In December, on the campaign trail in Raleigh, North Carolina, Trump stoked fears in his audience by repeatedly saying that “something bad is happening” and “something really dangerous is going on.” He was asked by a 12-year-old girl from Virginia, “I’m scared—what are you going to do to protect this country?”. Trump responded: “You know what, darling? You’re not going to be scared anymore. They’re going to be scared.” (Mc Adams, 2016)*

As we mentioned before, the concept of a deal represent his personal schemata, and knowing it, is the key to successful decision making. When he was speaking about a successful deal, he was mentioning: “protect the downside” (anticipate what can go wrong), “maximize your options,” “know your market,” “get the word out,” and “have fun.” (McAdams, 2016). When he was asked during the campaign, how he will negotiate trade deals with China, he said that he will guarantee a better health-care system by making deals with pharmaceutical companies and hospitals, and force Mexico to agree to a deal whereby it would pay for a border wall.

During his campaign he has often said that he would simply pick up the phone and call people in order to make propitious deals for the American people. By focusing on personal relationships and one-on-one negotiating he paid respect to a venerable political tradition. He described in his campaign manifesto how he will make America great again:

*“I find the people who are the best in the world at what needs to be done, then I hire them to do it, and then I let them do it ... but I always watch over them.”*

We have said that in his narrative, he appeared as a warrior. This will influence his foreign policy decisions. But during his life he was looking after economic victories, and now he has to win wars with diplomatic tools: “Everything begins with a strong military. Everything.”. he said that the enemies facing the United States are „more terrifying than those the hero has confronted in Queens and Manhattan [...]. There has never been a more dangerous time”. He called ISIS members as “medieval barbarians, [...], who must be pursued [...] relentlessly wherever they are, without stopping, until every one of them is dead.[...] Less frightening but no less belligerent are our economic competitors, like the Chinese. They keep beating us. We have to beat them.”

He appeared to be less prone to military action than certain other candidates. He has strongly criticized George W. Bush's decision to invade Iraq in 2003, and has cautioned against sending American troops to Syria.

#### 4. Conclusions

The role of leaders and leadership will continue to be important, but in conditions in which, at global level, it will exert a competition without reporting to rules, norms, institutions. It is more than sure that it will achieve short-term agreements and it is possible to reach to „accidents on the way”, with effects that might be costly for other states or even regions and an extension of a statutory new international order period.

The first 100 days of the first mandate of American President were dedicated to the internal policies. We observed that, even though President Trump had the slogan *America First* and that he was promised that he will dedicate mainly to internal aspects of governing, the fact that the International System is in an accelerated transformation, inclusive his declaration from campaign, he had a lot of bilateral communications, which shows:

- a. The changing of International System;
- b. The role of interdependences;
- c. The presence of idiosyncrasies,
- d. which triggered, at state level and state leadership level an impetuosity of approaching the foreign policy and international politics subjects.

For many people, the speech of Presidential Republican candidate and then elected President, Donald Trump, seemed lead this new reorganization of International System to chaos. Because of the new analysis and communication procedure, of advanced technology, of digitalization of everyday life, we have to realize that technology will help us to a most perfection geometric and rational construction othen in XX<sup>th</sup> century and that the foreign policy decision-making process could become more predictable, rigurous and efficient.

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## POLITIQUES LINGUISTIQUES EN EUROPE. DE LA THEORIE A LA MISE EN ŒUVRE.

*Mariana BUDA\**

**Abstract.** *Languages are and will always be the connection link and the communication point between Europe and its citizens. This is the reason why the linguistic policies are an important issue to which was granted, shall be granted and will be given a special importance in Europe, and not only. In order to protect and to promote Languages, EU implemented a number of linguistic policies to be promoted in its actions, despite all the challenges. Other countries, which are not members of the European Union, adopted their own rules regarding the languages spoken on their territory. Despite all, from theory to practice, there is always a gap*

**Keywords:** *linguistic policies, EU policies, promoting foreign languages, protecting languages*

La construction linguistique de l'Europe est très diverse. Dans un monde avec plus de 6000 langues en usage, il est donc clair que le monolinguisme est l'exception et que le plurilinguisme est la situation la plus répandue dans la majorité des Etats. Ces langues ont besoin des politiques linguistiques pour être préservées, pour encourager son utilisation, mais aussi pour établir clairement les règles de l'Etat et la distinction entre langues officielles, minoritaires ou régionales. Le plurilinguisme, ou le multilinguisme, représente la capacité d'une personne de parler et d'entendre plusieurs langues à la fois, mais aussi la coexistence de plusieurs communautés linguistiques sur le même territoire. Les langues qu'on parle représentent notre culture et notre identité et sont le premier instrument à utiliser pour communiquer, pour se comprendre et pour accéder à d'autres cultures. Vu dans cette perspective, le multilinguisme contribue à ouvrir l'Europe aux européens et aussi l'Europe vers le monde, en jouant un rôle important dans l'intégration des communautés des migrants et non seulement (Orban, 2008/47 : 44).

D'autre part, vu la mondialisation de nos jours, mais également les migrations de ce début de XXI<sup>ème</sup> siècle, à l'intérieur des pays la gestion et la protection de la langue nationale peut être un vrai défi. C'est pour cela que les politiques linguistiques s'imposent et elles ont un rôle crucial (Beacco, Cherkaoui Messin, 2010/3 : 97) : le rôle d'établir un équilibre entre les citoyens, le rôle de préserver l'identité nationale, le rôle de différenciation culturelle. Effectivement, en prenant en compte la globalisation de la communication d'aujourd'hui, qui implique la liberté de mouvement des idées, de l'information, des images, des personnes (Şoproni, 2011: 6), on peut affirmer que les langues n'ont pas des frontières. Ou, on peut considérer les langues comme faisant partie des frontières culturelles d'un espace (Stoica, Brie, 2010: 5), donc elles représentent une zone de contact qui fournit de la communication et de la coopération, mais sans être une

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barrière en sens propre. De la même manière que la danse, la cuisine ou la musique d'un pays sont ancrées dans une certaine frontière culturelle (Francfort, 2010 :109), les langues peuvent suivre le même modèle : on sait à qui elles appartiennent, on peut les utiliser tous, mais il est important de les diffuser et de connaître leur statut.

Ensuite, au niveau européen, le développement des politiques linguistiques est essentiel, car cela représente le bon fonctionnement de l'Union européenne. Leonard Orban, ancien commissaire européen chargé du multilinguisme au niveau de l'UE, précise que la mise en œuvre de ces politiques, tel que par exemple le renforcement des compétences linguistiques, permet de contribuer au développement économique, social et culturel de l'Union européenne, à une meilleure exploitation du potentiel de l'Europe du point de vue des emplois, ou, pourquoi pas, à une meilleure communication entre les européens qui pourront échanger des idées dans une manière plus cohérente et de participer plus activement à la vie politique et sociale (Orban, 2008/47 : 47).

Comme toute politique publique, les politiques linguistiques suivent tout un processus avant d'être adoptées. Ce processus est appelé aussi aménagement linguistique ou normalisation de la langue. Une politique linguistique peut faire référence à la forme d'une langue (par exemple à déterminer une forme standard ou les normes de grammaire), ou au fonctionnement socio-culturel (ça veut dire son statut, son territoire ou les deux, face aux autres langues existantes sur le même territoire) (Boyer, 2010/94 : 68). En ce qui concerne les normes de chaque Etat visant les politiques linguistiques, elles peuvent être établies par une institution ou une académie et visent surtout l'aspect de protectionnisme de la langue. Sur les territoires où on a plusieurs langues, ce type de politiques s'impose. La protection ne se réfère pas seulement à la langue nationale, mais aussi aux langues minoritaires, régionales ou des migrants parlées, qui ne peuvent pas être annihilées, ni les faire disparaître tout simplement.

### **Politiques linguistiques de l'Union européenne**

L'Union européenne intervient dans tous les grands aspects de la vie quotidienne de ses citoyens, en créant des politiques qui soient adaptées à chaque domaine d'activité. C'est pour cela qu'il existe des politiques concernant la sécurité alimentaire, l'emploi, l'agriculture, le développement économique, la culture, l'éducation, l'environnement et les énergies et beaucoup d'autres.

Une des politiques qui nous retient l'attention est la politique linguistique. Appelée aussi aménagement de la langue ou aménagement linguistique, la politique linguistique fait référence à la gestion des politiques menées par un Etat ou par une organisation internationale à propos d'une ou plusieurs langues existantes sur un territoire. Cela veut dire que la politique linguistique désigne les choix, orientations ou objectifs d'un Etat ou d'une organisation en vue de résoudre une situation préoccupante ou conflictuelle en matière de langue(s) (Boyer, 2010/94 : 67). Sur cette base s'appuie aussi l'Union européenne au moment de décider la nécessité d'une politique linguistique au niveau européen. Tous les Etats ont une politique linguistique, mais les Etats les plus intéressés à bien définir cette politique sont normalement ceux où on utilise de manière officielle plusieurs langues : la Belgique, pays où on parle le français et le néerlandais, ou l'Espagne, pays qui reconnaît dans sa Constitution l'existence et l'utilisation des langues régionales.

L'Union européenne a mis à disposition de tous les pays le cadre légal pour adopter des politiques linguistiques, car on reconnaît la diversité linguistique existante sur le continent et le fait que cette diversité linguistique permet la préservation de l'identité et de la culture d'une nation (Parlamentul European, 2016). Dans ce sens, l'Union

européenne, par sa direction responsable du multilinguisme, a désigné le jour de 26 septembre comme la journée européenne des langues.

Si on part de la définition de l'Union européenne, on saisit qu'elle est fondée sur le respect de sa diversité : « l'unité dans la diversité », ce qui signifie en fait la diversité des cultures, des coutumes, des opinions et des langues. L'article 22 de la *Charte des droits fondamentaux de l'Union Européenne* dispose que l'Union respecte la diversité culturelle, religieuse et linguistique (EUR-Lex, 2012). Egalement, son article 21 interdit toute discrimination fondée sur divers motifs, notamment la langue (EUR-Lex, 2012). Ensemble avec l'ouverture aux autres cultures, le respect pour la diversité linguistique constitue une valeur fondamentale de l'Union européenne. C'est la raison pour laquelle la politique linguistique de l'Union européenne en faveur du multilinguisme est diverse est bien fondée. Cette politique poursuit trois objectifs principaux : encourager l'apprentissage des langues et promouvoir la diversité linguistique dans la société, favoriser une économie multilingue performante et donner aux citoyens un accès à la législation, aux procédures et aux informations de l'Union Européenne dans leur propre langue. Chacun de ces objectifs a fait l'objet des différents projets européens au fil des années, qui ont eu de l'impact à faveur du multilinguisme.

Mais quel a été le résultat de la mise en œuvre de ces politiques linguistiques au niveau de l'Union Européenne ?

En ce qui concerne l'enseignement obligatoire des langues dans tous les pays de l'Union, la politique prévoit que chaque européen devrait apprendre deux autres langues en plus de la langue maternelle (Commission Européenne, 2001). Cette politique est assez ancienne, vu qu'on la trouve même dans les documents officiels de 1995, comme par exemple *Le Livre Blanc sur l'éducation et la formation*. Au cours des dernières années, la politique européenne en matière de multilinguisme a suivi l'objectif fixé lors du Conseil européen de Barcelone en mars 2002, à savoir une amélioration de la maîtrise des compétences de base, notamment par l'enseignement d'au moins deux langues étrangères dès le plus jeune âge. Elle a également été déterminée par la Communication de la Commission intitulée « Le multilinguisme, un atout pour l'Europe » et un engagement commun et par la Résolution du Conseil relative à une stratégie européenne en faveur du multilinguisme.

Dans ce sens, après des années, la Commission Européenne a mené et publié en 2012 une enquête très complexe auprès de 54000 élèves et leurs compétences en langues étrangères, dans 14 pays européens. Les résultats montrent des écarts importants entre les pays, mais laissent entrevoir des stratégies communes pour le développement des politiques d'apprentissage des langues (Commission Européenne, 2012 : 12). Parmi les résultats de cette enquête on mentionne : les politiques linguistiques devraient créer un cadre pour apprendre les langues de manière informelle, en dehors de l'école et devraient envisager l'exposition aux langues à travers les médias traditionnels ou récents, y compris l'impact du doublage ou du sous-titrage à la télévision et au cinéma pour que les jeunes se sentent capables d'apprendre les langues et en voir leur utilité ; la diversité linguistique reste vitale pour le développement personnel et culturel, même si sur le marché de travail toutes les langues n'ont pas le même intérêt ; les systèmes d'apprentissage doivent augmenter leurs efforts pour mieux préparer les étudiants (Commission Européenne, 2012 : 14). En ce qui concerne les langues les plus étudiées au niveau de l'Union européenne, il semble qu'elles sont l'anglais, le français et l'allemand, suivies par l'espagnol, dont l'apprentissage a le plus progressé. Au niveau de l'UE 28, en 2012 quand cette étude a été finalisée, l'anglais était étudié par 96,7% des étudiants, le français par 34,1%, l'allemand par 22,1% et l'espagnol par 12,2% (Eurostat. Communiqué de presse, 2014 : 1).

Une autre enquête représentative au niveau européen est celle de l'Eurobaromètre 386 par laquelle on essaie de comprendre l'expérience et les perceptions des européens en matière de multilinguisme (Commission Européenne, Eurobaromètre 386, 2012 : 2-3). On a fait cette enquête en 2005 et ensuite en 2012, en examinant les attitudes vis-à-vis de l'apprentissage des langues des européens ou de l'amélioration des capacités linguistiques, perceptions sur les langues les plus utiles et pas dernièrement points de vue sur les politiques européennes dans le domaine des langues. En comparant les deux enquêtes, même s'il y a une différence en ce qui concerne le nombre d'Etats participants, les résultats ont été similaires. Regardant les politiques linguistiques dans l'UE, plus de trois quarts des répondants (77%) considèrent que l'amélioration des capacités linguistiques devrait constituer une priorité politique. En plus, presque tous les répondants (98%) considèrent que la maîtrise des langues étrangères est très utile pour l'avenir de leurs enfants. Par contre, une réponse intéressante a été celle qui affirme que les institutions européennes devraient adopter une langue unique pour communiquer et qui est soutenue par 53% des répondants (Commission Européenne, Eurobaromètre 386, 2012 : 8-9), même si la politique linguistique des institutions européennes a toujours été de tout traduire dans toutes les langues officielles.

Un aspect important à prendre en compte en ce qui concerne les politiques linguistiques dans l'Union Européenne, a été la création et l'utilisation du *Cadre européen commun de référence pour les langues*, qui offre une base commune pour l'élaboration de programmes de langues, de manuels, d'évaluation des connaissances de langues en Europe. Ce cadre décrit de manière complète ce que les apprenants d'une langue doivent apprendre, afin d'utiliser le but de communiquer de manière orale et écrite. Egalement, le Cadre énumère les connaissances et les habiletés qu'un apprenant doit acquérir afin d'avoir un comportement langagier efficace. Pas en dernier lieu, le Cadre européen commun des langues définit les niveaux de compétences qui permettent de mesurer le progrès de l'apprenant à chaque étape de l'apprentissage et à tout moment de la vie (Conseil de l'Europe, 2001 : 9). Vu l'importance des langues et de leur apprentissage, le Conseil de l'Europe crée l'Unité des Politiques linguistiques (Conseil de l'Europe, 2012), ayant le siège à Strasbourg, et qui a le rôle de concevoir et de coordonner des projets qui encouragent le développement et l'analyse des politiques linguistiques, favorisant la diversité linguistique et le plurilinguisme.

L'économie multilingue de l'Union européenne a été et est encore d'actualité. Sur un marché européen toujours plus compétitif, les aptitudes de communication interculturelle mais aussi celles des compétences transversales jouent un rôle de plus en plus grand dans les stratégies de commerce et de vente. Les entreprises européennes ne peuvent pas perdre de l'argent et des clients et elles ont besoin des personnes compétentes à parler dans les langues de l'Union européenne, mais aussi dans celles des partenaires commerciaux de l'Union. Le programme d'échange Erasmus pour les étudiants est une des meilleures politiques linguistiques menée pour l'économie multilingue de l'Union européenne. Ceci parce que les compétences acquises pendant la période d'étude à l'étranger sont les mêmes que les compétences requises par les compagnies employeurs du moment : « 92% des employeurs recherchent des compétences transversales, avant même que les connaissances dans le domaine (91%). Les étudiants Erasmus sont mieux positionnés pour trouver leur premier emploi et pour avancer dans leur carrière professionnelle. Ils ont une vie davantage tournée vers l'international et sont plus susceptibles de vivre à l'étranger » (Brandenburg, 2014 : 17). Pour que le marché unique soit efficace, l'Union doit disposer d'une main-d'œuvre mobile. Des compétences dans



plusieurs langues multiplient les débouchés sur le marché de l'emploi, notamment par la possibilité de travailler ou d'étudier dans un autre État membre. Il y a des universités qui organisent des cours spécialisés dans le secteur linguistique. Une bonne maîtrise des langues étrangères est également nécessaire pour la vente, la logistique, le sous-titrage, les relations publiques, le marketing, la communication, le cinéma, la publicité, le journalisme, la banque, le tourisme, l'édition et la liste pourrait continuer.

Regardant le multilinguisme dans les institutions de l'Union européenne, le défi a été au fil du temps, celui de trouver un équilibre entre les coûts et les avantages d'avoir toute la documentation dans toutes les langues officielles, car la politique officielle était celle de traduire tous les documents, discours et communications dans toutes les langues (Climent Ferrando, Gimeno Ugalde, 2006 : 139). Différentes mesures ont été envisagées, comme par exemple utiliser l'anglais seulement ou même le triangle anglais-français-allemand, ou trouver une autre solution supérieure (Grin, 2006). Par contre, il semble que dans cet aspect il y a encore du travail pour établir une politique cohérente. C'est la raison pour laquelle les politiques linguistiques restent un thème d'actualité, un sujet à débattre, un domaine qui a encore besoin de solutions.

### **Politiques linguistiques en Suisse**

Un des pays européens qui ont toujours accordé de l'importance aux politiques linguistiques a été la Suisse. Pays européen, mais non membre de l'Union européenne, pays où on compte sur trois langues officielles et quatre langues nationales, la Suisse a adopté tôt des politiques visant les langues parlées sur son territoire, surtout parce que son statut est complexe avec tellement de langues. Confédération composée par 26 cantons, la Suisse comprend quatre grandes communautés linguistiques : germanophone (approximativement 63,7% de la population), francophone (20,4% de la population), italophone (6,5% de la population), romanchophone (0,5% de la population) et une petite communauté d'habitants qui parlent d'autres langues non officielles comme par exemple le franco-provençal, le lombard ou le walser (Leclerc, 2016). Cela donne une grande diversité linguistique qui a besoin des politiques linguistiques bien établies, même si la Suisse reste parmi les pays bien muni de législation dans le domaine linguistique, mais aussi dans son application. Est, donc, la Suisse un exemple à suivre en ce qui concerne les politiques linguistiques ?

L'expérience suisse en ce qui concerne l'aménagement linguistique en particulier et la diversité des langues en général, est inhabituelle et différente d'autres pays disposant des plusieurs langues officielles, comme la Belgique ou la Finlande, car elle n'est pas devenue un Etat multinational, mais un Etat plurilingue (Grin, 2010 : 55). En fait, c'est la raison pour laquelle on a pris l'exemple de la Suisse à côté de celui de l'Union européenne. Avec un nombre de langues inférieur à celui de l'UE, certes, la Suisse réussit de garder un ordre linguistique dans le pays et préserver l'identité de chaque langue utilisée sur son territoire.

La Suisse est un Etat fédéral où les cantons détiennent la souveraineté, ce que veut dire que c'est un pays fort décentralisé. Par conséquent, la langue locale est utilisée dans l'administration par les autorités fédérales pour leurs tâches directes, par les autorités cantonales pour leurs tâches spécifiques, par les autorités communales ou municipales pour des tâches qui leur sont attribuées (Grin, 2010 : 65). La responsabilité de définir la langue a été attribuée aux communes, surtout parce qu'il y a quelques districts ou cantons qui sont bilingues ou même trilingues. La législation linguistique au niveau fédéral se base sur trois articles de la Constitution : article 4, qui fait référence aux langues nationales,

article 18 qui fait référence à la liberté de la langue et article 70 qui fait référence aux langues de la Confédération Suisse. La mise en œuvre de ces articles est garantie, donc, par la loi.

**Figure 1** : Articles constitutionnels concernant les langues en Suisse

**Article 4 : Langues nationales**

Les langues nationales sont l'allemand, le français, l'italien et le romanche.

**Article 18 : Liberté de la langue**

La liberté de la langue est garantie.

**Article 70 : Langues**

1. Les langues officielles de la Confédération sont l'allemand, le français et l'italien. Le romanche est aussi langue officielle pour les rapports que la Confédération entretient avec les personnes de langue romanche.
2. Les cantons déterminent leurs langues officielles. Afin de préserver l'harmonie entre les communautés linguistiques, ils veillent à la répartition territoriale traditionnelle des langues et prennent en considération les minorités linguistiques autochtones.
3. La Confédération et les cantons encouragent la compréhension et les échanges entre les communautés linguistiques.
4. La Confédération soutient les cantons plurilingues dans l'exécution de leurs tâches particulières.
5. La Confédération soutient les mesures prises par les cantons des Grisons et du Tessin pour sauvegarder et promouvoir le romanche et l'italien.

**Source** : Constitution fédérale de la Confédération Suisse, accessed December 30, 2016, [http://eudo-citizenship.eu/NationalDB/docs/SWZ%20Constitution%201999\\_consolidated%20version%20as%20amended%203%20March%202013\\_FRENCH%20AND%20GERMAN.pdf](http://eudo-citizenship.eu/NationalDB/docs/SWZ%20Constitution%201999_consolidated%20version%20as%20amended%203%20March%202013_FRENCH%20AND%20GERMAN.pdf)

À une simple vue, ces lois paraissent simples à être appliquées. Dans la pratique il y a quand même quelques réserves. La Suisse compte sur un total de vingt-six cantons, dont dix-sept sont germanophones, quatre sont francophones et un est italophone. Dans ces cantons la situation n'est pas difficile, en fonctionnant d'après la loi en ce qui concerne les langues utilisées, ça veut dire qu'ils utilisent leur langue officielle. D'autre part, il y a les cantons bilingues ou trilingues. La Suisse compte sur trois cantons bilingues français-allemand et un canton trilingue allemand-romanche-italien. Dans le cas de ce dernier il y a une forte décentralisation en ce qui concerne les langues utilisées. La langue officielle est donc établie par les communes et cette compétence est toutefois définie par la législation cantonale où y est mentionné que les langues italienne et romanche ont des garanties particulières (Grin, 2010 : 67-68). Cette mention reflète en outre la préoccupation vis-à-vis de la menace de germanisation, mais également la préoccupation pour la préservation de ces langues en Suisse. On n'essaie pas un tout-à-l'allemand, même si, vu le nombre des cantons germanophones ce serait la situation la plus simple.

Un autre aspect important à mentionner est celui de l'enseignement des langues. Cet aspect se constitue dans une autre politique de l'Etat. Dans les années soixante-dix il a été élaboré en Suisse une politique des langues secondes qui supposait que les enfants apprennent dès l'école primaire le français dans la Suisse germanophone et italophone et respectivement l'allemand dans la Suisse francophone, italophone et romanchophone (Leclerc, 2016). Les cantons suisses avaient respecté pour un temps cette recommandation

et les enfants suisses commençaient l'apprentissage d'une deuxième langue nationale avant de suivre des cours d'anglais.

Par contre, en 1997, le canton de Zurich modifie sa politique et introduit l'anglais à partir de la première année de primaire sous forme de cours « d'anglais précoce », en considérant l'anglais plus important que les autres langues nationales. Cette décision a suscité de la polémique dans l'Etat et le gouvernement fédéral a voulu stopper cette décision, mais le canton a invoqué l'autonomie cantonale en matière d'éducation. Cela veut dire qu'aucune disposition ne peut empêcher un canton d'introduire l'anglais comme première langue étrangère à l'école si des objectifs d'apprentissage sont fixés et respectés pour la seconde langue nationale. Autrement dit, un canton ne viole le paragraphe 3 de l'article 70 de la Constitution que si l'anglais l'emporte sur le français en tant que première langue seconde (Leclerc, 2016). Plus tard, en 2003, la *Déclaration relative à la politique de l'enseignement des langues* rectifie l'apprentissage des langues en Suisse, en établissant le fait que l'allemand est obligatoire d'abord et seulement ensuite, plus tard, l'anglais, dans les cantons francophones.

La *Loi sur les langues*, initiée en 2001 et entrée en vigueur en 2009 est une autre loi que fait partie de la politique linguistique de la Suisse. Cette loi vise les langues dans l'enseignement national, en favorisant la promotion des langues nationales, en échange des subventions comme la formation des professeurs, l'enseignement immersif, les échanges d'élèves et d'enseignants, l'aide à la production de moyens d'enseignement. Même si la loi a eu besoin de temps pour être adoptée, au présent elle est en vigueur et la Suisse continue être un modèle en ce qui concerne la préservations des langues nationales, la protection du multilinguisme mais aussi le statut d'Etat plurilingue.

En ce qui concerne les langues de la législation, donc les langues utilisées dans le Parlement fédéral de Berne, la situation suisse est très similaire à celle de l'Union européenne. Cela veut dire que les députés ont le droit de s'exprimer dans la langue de leur choix. Etant donné que les germanophones sont majoritaires, l'allemand reste la langue la plus utilisée. Mais, en même temps, les francophones utilisent le français. Par souci d'efficacité, les italophones et les romanchophones ont tendance à utiliser l'allemand ou le français, même si leurs langues ne sont pas interdites. Par contre, elles sont peu utilisées dans le Parlement. D'autre part, le Parlement fédéral utilise un système de traduction simultanée pour l'allemand, le français et l'italien, mais non pas pour le romanche. Cela arrive car il est considéré que cette langue entraînerait des coûts disproportionnels pour l'Etat. Un autre problème qui survient est le fait que les germanophones utilisent dans leurs discours l'allemand suisse, qui, semble-t-il, est différent de l'allemand standard et peu compréhensible pour les autres, alors que la traduction simultanée ne se fait qu'avec les langues officielles, c'est-à-dire l'allemand standard, le français et l'italien (Leclerc, 2016).

Par ailleurs, le Parlement se compose de deux chambres : le Conseil national et le Conseil des Etats. Au Conseil des Etats, seulement l'allemand standard et le français sont autorisés comme langues des débats. Par contre, cette chambre ne dispose pas de système de traduction simultanée, ce qui oblige les députés à être au moins bilingues ou trilingues, dans le cas des italophones. En ce qui concerne la langue de publication des textes législatifs, toutes les lois sont promulguées et publiées dans les trois langues officielles considérées importantes – l'allemand, le français et l'italien – et toutes les variantes sont considérées comme étant le texte original (Conseil fédéral, 2004). En outre, il y a un programme qui traduit en romanche aussi les lois considérées les plus importantes comme

par exemple le Code pénal, la Loi sur l'égalité, la Loi sur l'assurance des accidents ou la Loi de poursuite pour dettes et faillite, mais autres lois aussi.

Sur les politiques linguistiques en Suisse on pourrait débattre encore plus, car il y a aussi d'autres domaines de la vie où elles s'appliquent. Juste pour énumérer quelques-unes, on pourrait mentionner les langues dans l'administration fédérale, les langues dans les tribunaux, dans les médias, ou même le statut des langues régionales et minoritaires, mais cela dépasserait le cadre de cet article. Nous avons pris seulement les domaines où nous avons considéré que c'est plus important. Les particularités linguistiques de la Suisse pourraient faire seules le sujet d'une recherche à part. Par contre, il ne faudrait pas conclure que tous les problèmes linguistiques sont résolus en Suisse. Il reste encore le problème d'enseignement des langues et le problème des langues fédérales pour lesquels il faut trouver des solutions adéquates.

**En guise de conclusion** il est important de mentionner qu'une politique linguistique n'est pas synonyme à la législation linguistique. Une politique linguistique est plus tôt déclaratoire et peut comporter surtout des mesures administratives. Elle peut se traduire dans une législation linguistique qui régle l'utilisation d'une langue ou des langues sur un territoire donné ou qui édicte des droits et des obligations linguistiques. Également, si on considère que certaines situations ou certains comportements linguistiques peuvent être orientés par le droit, il est possible de parler aussi de droit linguistique. Par contre, la question du droit linguistique est problématique, car elle est liée aux droits linguistiques individuels, propres à des personnes et aux droits linguistiques collectifs, propres à des communautés linguistiques (Loubier, 2002 : 1-2). Il serait difficile de déterminer si le droit linguistique viserait l'individu ou bien les membres d'une communauté linguistique. En même temps, il serait difficile de concilier la liberté d'expression de chaque personne avec la légitimité de l'Etat de choisir les langues officielles. Ce qui est clair c'est qu'aucune politique linguistique ne peut franchir la frontière du domaine privé.

Par contre, la conscience de la diversité linguistique existante sur plusieurs territoires et l'influence de plus en plus marquée des pratiques langagières dans leurs sociétés, a imposé le recours à des outils d'organisation linguistique. Ces outils sont utiles non seulement pour aider à la maîtrise des langues ou variétés de langues, mais également pour ajuster les relations entre les groupes des personnes qui utilisent des langues différentes à l'intérieur d'un même espace social (Loubier, 2002 : 4-5). Au fil du temps, ces outils ont démontré leur importance et leur rôle et chaque Etat ou organisation internationale a essayé, au moins, d'introduire dans leur législation des aspects relatifs à la diversité linguistique.

Donc, une politique linguistique peut se traduire par un ensemble de décisions qui peuvent être prises au niveau de l'Etat, d'une organisation, d'une entreprise, d'un groupe. Également, une politique linguistique peut avoir seulement une fonction symbolique, sans aucun moyen d'être imposée, ou se baser sur un état de fait existant sur un territoire donné. Une politique linguistique peut aussi se transformer dans une législation linguistique, en ayant ainsi plus de légitimité. Mais, ce qui est d'usage est qu'à partir du moment où il y a de la coexistence linguistiques, il y ait aussi une tendance pour les groupes de s'approprier l'espace tant du point de vue géographique que politique, économique ou linguistique.

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## **II. Communication, Culture and Education in Europe**

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## THE NECESSITY OF APPEAL TO CULTURE AND IDENTITY FOR THE STABILITY OF EUROPE

*Laurențiu PETRILA\**

**Abstract:** *When discussing the cultural and identity-value dimension of the European domain, more than ever it is important firmly to reiterate the idea that everything came into being thanks to an ontological unity of common faith and even common circumstance, a unity which sought to compare itself to the outside, but also (and especially) to defend itself from it. The distinctly European quality became observable through political, social, economic, and especially cultural and religious similarities. These various similarities were, at bottom, an emanation of an identity and of an already-consecrated Christian European culture.*

**Keywords:** European identity, future of Europe, values, Christianity

### Introduction

When discussing the cultural and identity-value dimension of the European domain, more than ever it is important firmly to reiterate the idea that everything came into being thanks to an ontological unity of common faith and even common circumstance, a unity which sought to compare itself to the outside, but also (and especially) to defend itself from it. The distinctly European quality became observable through political, social, economic, and especially cultural and religious similarities. These various similarities were, at bottom, an emanation of an identity and of an already-consecrated Christian European culture.

The present study proposes an historical excursion into matters of European culture and identity. This whole brief journey is intended to highlight the reality, but also the immanence, of this approach for the future of Europe. We recognize that Europe initially appeared not so much for economic reasons, but for a reciprocal rediscovery of similar cultural values, ideas, and knowledge. Thus, the political and social “feel” today suggests a lack of these similarities. We wish, once more, through the present study, to emphasize the fact that the similarities which we have already referenced are as old as European history itself. If a particular ethos, a particular faith, certain particular values or even social mores have constituted Europe, we must perceive and recognize the reality that Europe has renounced its own identity — more than that, we may even say that the Europe of today denies itself. In order to return to the vigor of yesteryear, to empower it as much from an institutional point of view, as also from the point of view of short- and middle-term projects, the solution is an appeal to memory, which is implicitly an appeal to identity, to origins.

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### Identity and european culture

In order to present the European culture of today, we have to gaze retrospectively at what the European culture of yesteryear was initially. We propose to follow, in chronological order, the evolution, development, and certainly also the diversification of the meaning of European culture for today.

Before anything else, it would be well to specify the concept of “Europe,” of a European zone, of who can be part of European culture and who cannot. In spite of the diversity of opinions, it is difficult to have an objective notion of European culture if you are yourself European. We draw closer to an objective approach, in the first place, if we specify that the European cultural space was, is, and will continue to be in a continuous flux, development, and evolution. Implicit in this, keeping in mind the discussions taking place within this zone, is the fact that we will never be able to have an exhaustive approach to the matter of European culture. To the extent that we recognize the zone to be larger from the point of view of culture, to that extent we draw closer to the meaning of European culture. We draw nearer to Europe—that is, to a cultural space where unity is characterized by an evolving and organized diversity.

Granting the indispensable elements of geography and history, the unification of Europe as the primary objective of the European Union is realized through cultural belonging. Thus, we have cultural belonging by judging institutions and culture. Therefore, the geographical, historical space of Europe does not necessarily demonstrate a cultural Europeaness. From this point of view, it is possible to find European culture in other spaces, not only in the strict sense of historical and geographical Europe (Marga, 1998:25). We may even say that any geographical or historical area, so long as it has specifically European elements, is a necessary component of European culture.

By “culture” we may understand a variety of philosophical ideas, scientific theories, ideological programs, as well as artistic symbols. However, beyond that, all of these have to receive the form of a lived human life from a social point of view. In this manner, culture means commerce, production, research, and the circulation of ideas reflecting upon the spiritual life (Marga, 1998:26). If we accept this perspective on culture, we can go further in the methodical establishment or construction of European culture. And how else might we do this, except by keeping in mind the history of European culture? I will mention certain opinions as landmarks and guides for analyzing and understanding the distinguishing features of the European, especially by appeal, in the beginning of the study to follow, to the esteemed professor Dr. Andrei Marga’s work, *Filosofia Unificării Europene* [*The Philosophy of the Unification of Europe*].

*In any case, Europe began to define itself in the context of the Ottoman threat, and it always understands itself in relation to something different* (Galowitzer, *Europa Abendland*: 826). The concept of “Europe” began to exist due to a unity imposed by circumstance, a unity which sought both to compare itself to the exterior, as well as to defend itself from the exterior. In fact, in the beginning, the specification of Europe and of European culture was done only relatively, in relation to Asia and then later to America, when the latter offered or attempted to be an alternative to European culture, something almost easily believed even without argument. The present study is salient and relevant because we are obliged or perhaps challenged to relate ourselves to others in order that we may reconfigure ourselves. Those elements which have to do with the challenges of today’s Europe, as seen through the lens of the relation to immigrants, adherence to values, demographic reconfigurations, etc. we will analyze in greater detail in the next chapter.

As Friedrich Heer has noted, in *The Apparition of Europe (Aufgang Europas)*, only in the twelfth century can we speak of a Europe relevant for today. In this period, the distinguishing characteristic of European history became observable: a controversy about matters political, socio-cultural, religious, economic, and purely social among persons with the same place of origin (Heer, 1949:15). However, it is important to mention, and indeed we must specify, that Europe was understood exclusively in relation to or together with Catholicism until the reforming acts of Luther at the beginning of the sixteenth century (Marga, 1998:27).

Throughout history, Europe suffered a series of ruptures, which are extremely important for our methodical investigation. From a religious point of view, Europe was divided because of Protestantism; from a political perspective, the division occurred as a result of the French Revolution in 1789; and modern science divided it from the point of view of modes of knowledge (Marga, 1998:28). All these changes accomplished nothing else than to sketch the increasingly certain contours of what Europe, in fact, represents.

From a spiritual perspective, Novalis, in his essay *Christendom or Europe (Die Christenheit oder Europa, 1799)*,<sup>1</sup> see a project of European construction with a manifestly romantic distinguishing quality. The successful realization of European unity is only possible through a revival of sacred, of the sense of the sacred. Novalis sees Europe as a grouping of nations which ought to be grouped not in a classic administrative-political manner, but in such a way as to operate naturally, a freedom in relationship, in other words *organically* (Sandu, 2009:25). These days, the European Union exists as a political reality, a construct of states which is basically an economic-administrative union. Beyond these realities, a question arises out of the necessity of clarifying a common European identity, of a common cultural belonging. Will we therefore have a European identity, a European culture, or will each citizen assume a name according to his own country, appealing to the spirit of European uniqueness only when in need of freedom? After having noted all these matters, the only thing certain is that the distinguishing quality of the culture is continually evolving, but also continually being defined.

Another important aspect was noted by Nietzsche, who presents Europe thus: *Greek culture, grown out of Thracian and Phoenician elements, Hellenism, the philhellenism of the Romans, their Christian empire, Christianity which bore ancient elements, elements from which were eventually born the nuclei of science, from philhellenism results a kind of philosophism: to the extent that it is believed in science, we are talking about Europe. Romanness was left behind, Christianity faded* (Riedel, 1991:9). From the point of view of culture, Western Europe, in Nietzsche's opinion, represents the victory of Roman Hellenism over Greek tragedy. In fact, Nietzsche even reproaches Europe for its rigid forms (including but not limited to nationalism, communism, and conservatism), considering that these inflexible forms which always lead to conflict and revolutions. Max Scheler observes this tendency, considering this to be an obstacle to European cultural unity. Scheler affirms that Europe represents a spirituality characterized by the autonomy of values, but also by the recognition of laws and of general rules which uphold the fundamental value of solidarity (Marga, 1998:29).

Europe was seen from the perspective of chances, of possibilities given to the individual. This vision was expressed by Max Horkheimer, who emphasized two aspects of the European concept. First, there is *an individualization, assured by reflexivity (leisure*

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<sup>1</sup> Novalis, Fragments: *Christenheit oder Europa*, Kapitel 26. The text is available online: <http://gutenberg.spiegel.de/buch/fragmente-6618/26>, accessed on 15/12/2016.

time, meditation, freedom for melancholy, and many others), and second, humanism (Horkheimer, 1985: 82).

We arrive at the 20s, when, in the specification of "Europe," a new situation enters into the equation, a specification for which we can thank Richard Coudenhove-Kalergi, the founder of the pan-european movement. He sees America and Russia as collectivized societies, the first according to a capitalist model and Russia according to a communist one. In this comparison of similarities, Europe appears as a temple of individualism and freedom. Europe is the place where any citizen whatsoever can organize his life as he likes. From this perspective, Edmund Burke said that, for a European, no other European country can be considered an exile (Burke, 1912:84).

In the minds of many, this freedom to organize one's own life corresponds with a powerful development in relation to the diversity of countries in Europe. According to the vision of Coudenhove-Kalergi, *European individualism corresponds to the European cult of personality* (Coudenhove-Kalergi, 1966:123). There exist, however, supporting elements to prevent this individualism from devolving into anarchy, so that democracy can function. Europe drew its depth from Christianity. Its form comes from the Greeks, and its strength comes from the Germans. All these three dimensions which keep Europe meet in the European spirit only that in area named liberty (Marga, 1998:30). However, according to André Philip, a French politician from the middle of the twentieth century, the distinguishing European quality is seen in three points. Thus, we have: *the Greek concept of individuality; the Roman concept of justice and of the citizen; and the biblical concept of the human person* (Philip, 1958: 258). Cardinal Ratzinger describes the same culture but in four points, adding to those mentioned by Philip a *Latin inheritance*.

The Romanian philosopher Constantin Noica defines Europe as a zone of free action, but which is recognized for its capacity to produce. He sees Europe as an area where unity is defined through synthesis, a unity which functions only by diversifying itself (Noica, 1988:44).

Having made these telegraphic preliminary remarks, which to some extent have oriented and situated European culture, we draw nearer to today, and we can see what Europe is, effectively, today. What is European culture today? Taking into account the process of European unification and integration, before anything else we must have in mind a system which makes this process possible. Very well: for this system to function, it has need of a series of subsystems, which ought to have a specific teleological form, subsystems which through their difference create the system. Subsystems which have a goal-oriented form are certainly motivated by a series of needs and traditions to which they respond, these subsystems becoming in this manner the European culture of today. Consequently, we have techniques of production and the economy which spend human energy and produce goods for the needs of European citizens. Here we have to do with the principle of economic yield, which Max Weber spoke about in *The Protestant Work Ethic: Where capitalistic acquisition is rationally pursued, the corresponding action is adjusted to calculations in terms of capital... at the close of a business period, the balance of the enterprise in money assets (or, in the case of a continuous enterprise, the periodically estimated money value of assets) exceeds the capital, i.e. the estimated value of the material means of production used for acquisition in exchange* (Weber, 1992:32). This is economic yield.

Then we have something extremely important administration, which in the most effective way assures the activities of the community, whatever they might be. The European culture of administration developed in close connection with every individual.

Administrative politics was undertaken attentively, according to each microcommunity individually, regardless of how narrow it might be. Professor Marga notes: *You do not belong to European culture if the administration of your society does not pass the test of rationality* (Marga, 1998:38). In the third place, we have that subsystem named “politics” or “political thought,” which legitimates the fundamental elections in structures of the community, whether these are administrative or monetary. Today, in European culture, politics is an environment in which to live. In fact, European politics is closely connected to the construction of the person, who receives a private sphere, but who also is assured various important guarantees which evidently have to do with a number of fundamental and inalienable rights. European politics mediates problems of general interest and does not allow itself to be reduced through its own structure (Marga, 1998:40).

Finally, we have the subsystem of spiritual culture. The appearance of this culture owes to a continual reflexivity of human life, keeping in mind both the intellect and the soul.

### Concluding remarks

Georges Bernanos, the French essayist, writing in the period immediately after the Second World War, composed a terrible line which has remained branded in the minds of many European analysts. Overwhelmed by what he had seen of humanity in the War, as well as by the manner in which the way towards peace was being maneuvered in post-bellum period, in the same disorder and senselessness: *Christendom made Europe. Christendom died. Europe will crumble. What could be simpler?*<sup>2</sup> We do not know with certainty if Bernanos is right, but we certainly can know that Europe is in an unprecedented crisis, grounded in an unsettling proportion of secularization and, at the same time, in a growing percentage of citizens of other faiths than the Christian faith.

Modern civilization was born of Christian civilization, and Europe cannot deny the fact that its origins lie in the very same.<sup>3</sup>

*A latent Christian Europe exists, and we lack only the courage to bring it to the light of day, in a manner which, avoiding the errors of the past, does not condemn the past neither to be forgotten, nor to be manipulated ideologically, nor to be resented.* Europe is seen as *a matrix of this global religion, a geometric space of Christian interpretations of the meaning of universal history* (Baconsky, 2007:31).

In order to reconstruct its identity and to specify the contours of its unitary spirit, the *acceptance of its inheritance* is crucial. *If Europeans claim their distinct identity, if they still have the pride of a specific difference and the ambition of counting in new geopolitical arrangements, then they will be obliged to remember the place whence they've come and to reintegrate the Christian idea into their fundamental canon. Christianity exceeds the European context, in both distribution and style. But can a Europe exist without Christianity* (Baconsky, 2007:17).

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<sup>2</sup> <http://inliniedreapta.net/monitorul-neoficial/bernanos-%E2%80%9Dcrestinatatea-a-facut-europa-crestinatatea-a-murit-europa-va-crapa-ce-poate-fi-mai-simplu%E2%80%9D/>, accessed 06.12.2016.

<sup>3</sup> Horia Roman Patapievic- [http://www.ideiindialog.ro/articol\\_794/noua\\_europa\\_si\\_voceace\\_care\\_lipseste\\_\\_crestinismul.html](http://www.ideiindialog.ro/articol_794/noua_europa_si_voceace_care_lipseste__crestinismul.html), accessed 05.12.2016.

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## SECRET VS. OPEN IN OPEN SOURCE INTELLIGENCE

***Raluca Codruța LUȚAI\****  
***Claudia Anamaria IOV\*\****

**Abstract.** *This paper focuses on the concept of Open Source Intelligence and the effects that openness and the increasing use of open sources has on the management of classified information. Without claims of completeness, the paper discusses the issue of open information vs. closed (classified) information in a moment of change for the intelligence community.*

**Keywords:** *Intelligence, Open Source Intelligence, Open, Secret*

### ***Introduction***

In a world of complex interdependencies increasingly dominated by the amazing technological advances, information and especially the one who has the information has a growing power. The Internet has conquered the world and has secured the role of the main generator of information in nearly all areas representing both an opportunity and a challenge to the world in which we live.

In this context, societies are changing and the changes do not go unnoticed for the intelligence community and the management of information. When we talk about the intelligence community we undoubtedly talk about information and in this era where information is everywhere due to the amazing technological advances, a change in the way that intelligence communities relates to the huge amount of information is needed. Cold War brought an important change in vision in the field of information analysis. Until then, the essential characteristics of information security have long been understood solely in terms of confidentiality, shrouded in an aura of mystery. Information was held only by those who were prepared to hold it or perhaps what's most important, those who managed to collect it.

The abundance of information causes a change in how experts are trained in how information is obtained and how it is used or stored. The attribute of classified and unclassified changes and the importance of open source is becoming increasingly overwhelming producing true mutations in how the classified information was regulated so far.

### ***Open Source Intelligence- (r)evolution in intelligence***

Open Source Intelligence is the result of a process that involves identifying, validating, collecting, collating and analysis of information with the aim of developing products with relevance in terms of national security, products with specific intelligence requirements. In short, when we talk about OSINT we talk about a suite of information gathered from so-called open or public sources like newspapers, TV, internet sites which find use in the intelligence community.

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The novelty and importance of this topic for the intelligence community is undeniable. This is reinforced by one of the leading exponents of Romanian intelligence, George Maior who appreciated the fact that "so-called Open Source Intelligence has acquired a growing importance in the current security risk management" (Centrul de Surse Deschise, *Gidul OSINT*, p.2. available at [www.sri.ro](http://www.sri.ro), accessed in 15 November 2016.)

We believe that the current information specialist should not only be the guardian of information and not a subject of the „need to know” principle but rather a "trader" of information, a follower of the „need to share” principle (Florian Schaurer, Jan Storger *Osint Report 3/2010*, ISN-International Relation and Security Network, 2010,5). As the sources of information are more abundant it is more than impossible for anyone to be able to analyze them all, and an exchange of information would be more than useful. In this context, the way in which this information is managed and handled changes.

Considering these aspects and the awareness that society is more open and the information is more robust, we firmly believe that the concept of OSINT will become increasingly important in this area. Even though it probably will not cause a revolution in the intelligence community, it will certainly produce an evolution.

OSINT concept became popular in the context of the attacks of 11 September 2001 when most experts have concluded that the attacks on the World Trade Center were the result of lack of coordination between US intelligence. American services at the time were deeply rooted in principle *need to know* and too little aware of the benefits of the *need to share* principle. The report of the Commission created to investigate the attacks strongly recommended setting up an agency to deal with the study of open sources because finally realising that information and intelligence is not always something secret and well-guarded. Following the commission recommendation in 2006 was set up the Open Source Center, a center working on studying the so-called open sources.

The idea of studying open sources is not new, it goes back in time. The predecessor of OSINT was what was called the Foreign Broadcast Monitoring Service (FBMS) created in 1941 at the initiative of US President F.D. Roosevelt in order to translate and analyze propaganda messages against the United States and transmitted via radio. Redefined in 1947 as the Foreign Broadcast Information Service, it was expanded and was dealt with messages transmitted via television. After 1992 the US intelligence community decided to create a separate department for the exploitation of open sources and after ten years after the importance of this department is growing.

Today it is estimated that approximately 80-95% of all data used by intelligence communities is provided through OSINT. This information is gathered from public sources like media, public agencies, think-tanks, universities or NGOs. The growing importance of OSINT is directly related to the opening of analysts towards the sharing of intelligence.

The literature divides open source into three broad categories: *classics* such as periodicals (newspapers and magazines), books, documentary materials (brochures, studies), radio transmissions and video (TV, radio), the so-called *gray literature* (comprising materials which are not available through traditional channels of publication as: reports and official documents, data and information from academics, geospatial data) and the *new media* that emerged in recent decades: (a) social media, blogs, websites, virtual worlds (as Second Life etc) or already famous (b) social networks like Twitter or Facebook.

Of course this new step in the evolution of intelligence brings a number of advantages and disadvantages. Among the advantages it is worth to mention the lower costs involved and the rapidity in which you can get the information. Once it is obtained



the information can be analyzed via several sources and can be easily disseminated. The advantages are certainly much more than the disadvantages. The disadvantages of using OSINT refers to overload handling systems or the collection of inaccurate or incomplete data and information.

Although the advantages outweigh the disadvantages, the role OSINT can't be exaggerated. Its importance is increasingly larger but still does not managed to impose itself as the main source of intelligence. Importance of the other "INT s" like HUMINT, SIGINT, MASINT and IMINT can't be neglected. Referring mainly at OSINT the NATO Handbook underscores this aspect very well, likening intelligence with a puzzle that would be incomplete if any of these parts (HUMINT, OSINT, SIGINT etc.) would be missing: „Open Source provides the outer pieces of the jigsaw puzzle witch Without Niether one of can begin or complete the puzzle. But They are not enough of Themselves. The precious pieces of the puzzle inner, often the most difficult and most expensive to Obtain come from traditional intelligence disciplines. Open Source Intelligence is the critical foundation for all source intelligence products, but it can't ever replace the totality of the all-source effort” (\*\*\* Nato Open Source Intelligence Reader, februarie 2002, p.10.).

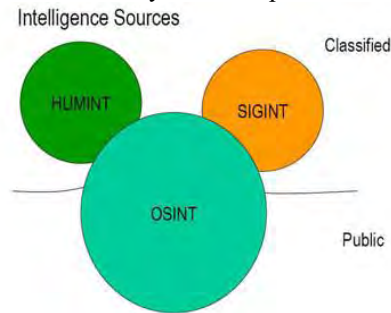
We believe that the Cold War has produced a redefinition of intelligence communities and OSINT field will certainly be an area of growing interest for those who wish to hold power through information.

### ***OSINT and the boundry between secret and public***

The recourse to an information process that is based on open information sources has the same purpose as a classified source: namely collecting useful data for national security. Classified sources today is no longer the main source of information collection and this is due to the developments that the society has lately experienced .

Today, more than 80% of national security information is collected through open sources. "If yesterday was difficult to find information due to their lack today is difficult because of the abundance of information," (Ella Magdalena Ciupercă, “Sursele deschise de informatii intre provocare și necesitate” in *Intelligence* (anul 5, nr14, decembrie 2008, București,7) said one intelligence specialist. This is not far from the truth given that the Internet now occupies a place increasingly important in our lives and it's the main vector of globalization that characterizes modernity. In these circumstances the importance of classified information is not questioned. OSINT is ambivalent and pegs between secret and public (Theodor Mitu, Daniela Mitu, “OSINT la granița dintre secret și public” în *Revista Română de Studii de Intelligence*, nr. 4, decembrie, București.42.), being on the border between them, as shown in Figure 1:

OSINT is a symbol of intelligence sharing principle (need to share) as stated by Robert David Steel one of the fathers of the OSINT concept . He believes that "in the last decades of pioneering the OSINT until now, in the age multi-institutional, multidisciplinary analysis and safeguard information, the human factor has become increasingly important as the essence of the XXI century is no longer a secret to steal from someone, but to strive to disseminate information across the planet for the benefit of the entire community. "

**Fig.1.** The boundary between public and secret

(Source: Romanian Journal of Intelligence)

The products obtained through OSINT are the foundation that builds secret information. Arthur Hurlik in *The Oxford Handbook of National Security Intelligence* considers that "although OSINT products come from public sources and other open sources, some of these sources should be treated as sensitive and the final result, extracted and analyzed in a classified manner" (Theodor Mitu, Daniela Mitu, "OSINT la granița dintre secret și public" în *Revista Română de Studii de Intelligence*, nr. 4, decembrie, București.44)

W. L. Lahnerman discusses the relationship that arises between the concept of secret and open in OSINT. He believes that in the binomial open-secret there can be four types of information flows, flows that can significantly influence the management of information. These four streams of information are:

- Secret-Secret. In this case we speak of sensitive sources must be operated only by the connoisseurs and intelligence analysts.
- Open-Secret. In this case the intelligence services correlates information using classified methods and sources. The resulting products will be secret and will be used to inform decision-makers and government officials.
- Secret-Opened. The tragic events of 11 September 2001 showed that the level of classified information can hinder the sharing of information. Thus such classified information can be declassified, open and used to inform the local authorities and those with responsibilities in law.
- Open-Open is the fourth stream that grows in importance and intensity with increasingly obvious dominance of the Internet (Theodor Mitu, Daniela Mitu, "OSINT la granița dintre secret și public" în *Revista Română de Studii de Intelligence*, nr. 4, decembrie, București.43-44.)

Today the binomial open-secret becomes imperative in the period in which OSINT is on his way to becoming the vanguard of the intelligence community. We therefore believe that promoting a new concept in the intelligence process in which the information either secret or open is placed in a trusted network is vital. It requires such a harmonization of these two concepts because neither is inferior to the other and both are more than important for the intelligence work.

OSINT potential should not be ignored because ignorance is vulnerability, as like no classified or unclassified information should not be forgotten or left to chance.

In a world where speed characterizes most events in which change is on the agenda and information more abundant, intelligence services and institutions dealing with intelligence are facing a time when they are need to adopt a harmonizing information

coming from both directions. The distinction between open and secret is very important but most of this is undoubtedly how data and information are used and transformed into intelligence.

Tomorrow's world will be a world in which the Internet will monopolize most human activities, a world that will be hard to distinguish between secret and open and OSINT will become increasingly influential and profitable. For a better performance intelligence services need to understand this and to use the open information to cover more areas or areas not so well covered by other means of collection and analysis.

### **Conclusion**

Cold War brought an important change in vision in the field of information analysis. If until then, the essential characteristics of information security have long been understood solely in terms of confidentiality, shrouded in an aura of mystery today much of the information can be gathered from open sources. The abundance of information causes a change in how experts are trained in how information is obtained and how it is used or stored. In this context Open Source Intelligence has an increasingly overwhelming role in analysis and intelligence gathering.

Classified sources today are no longer the main source of information collection and this is due to the developments that the society has experienced lately. In these circumstances OSINT strengthens its role in the generating proces.

Today binomial secret-open becomes imperative in the period in which OSINT is on his way to becoming the vanguard of the intelligence community. Regarding this binomial, we saw that the literature discusses four information flows: secret-secret, open-secret, secret-open and open-opened. Intelligence communities requires a harmonization of these two concepts because neither is inferior to the other and both are more than important in the intelligence work. For a better performance intelligence services need to understand this and to use the open information to cover more areas or areas not so well covered by other means of collection and analysis.

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## ASPECTS OF INTERCULTURAL COMMUNICATION IN ROMANIA AND SOCIAL REPRESENTATIONS CONCERNING IMMIGRANTS

*Dragoș DĂRĂBĂNEANU\**

**Abstract.** *The article deals with the topic of intercultural communication from the perspective of Romania's population attitudes that are develop and express in relation to immigrants. It assumes that the European model of social construction requires mandatory rules and constructive ways of interaction between different ethnic groups. Migrants represent ethnic groups with high vulnerability to the risks related to social inclusion. Acceptance and integration of immigrants is proof of social maturity, a good reason to believe that the issue of intercultural communication is on a good path of expression in Europe. The practical analyses we propose below are primarily concerned with the way in which the Romanian society is manifested in the context of interactions with external social groups. The study we propose represents a secondary analysis which has as source the database developed while carrying out a Study on the immigration phenomenon in Romania.*

**Keywords:** *intercultural communication, European Union, immigrants, social representations*

Human condition is contradictory in that action is limited, but curiosity and thirst for knowledge are not. However, the two contradictory aspects of human condition have common points and the best is that both aspects generate interaction and communication. This mechanism underlies self-knowledge and knowledge itself generates both general and individual benefits, thus shaping existential meanings for people and societies.

Completing the natural condition of human species, the contemporary world provides various and effective instruments that facilitate the need of knowledge, but at the same time it significantly pushes the boundaries of access related to action. We mention here the means of travelling and communication, which increase the potential of the individual concerning the relationships that he establishes with the surrounding world. In these circumstances, the interactions among different ethnic groups and the communication among people belonging to different cultures are becoming usual or often even mandatory phenomena. At the same time the media have overcome geographical barriers, the easy access to internet and phone enables the modern man to maintain friendly or functional relations with other people without the restriction of distances. Mass communication offers virtually unlimited access to information about events, personalities and social groups from almost anywhere on the planet. Amid these realities, the possibilities of strategy construction of personal, family or group development seem to be endless.

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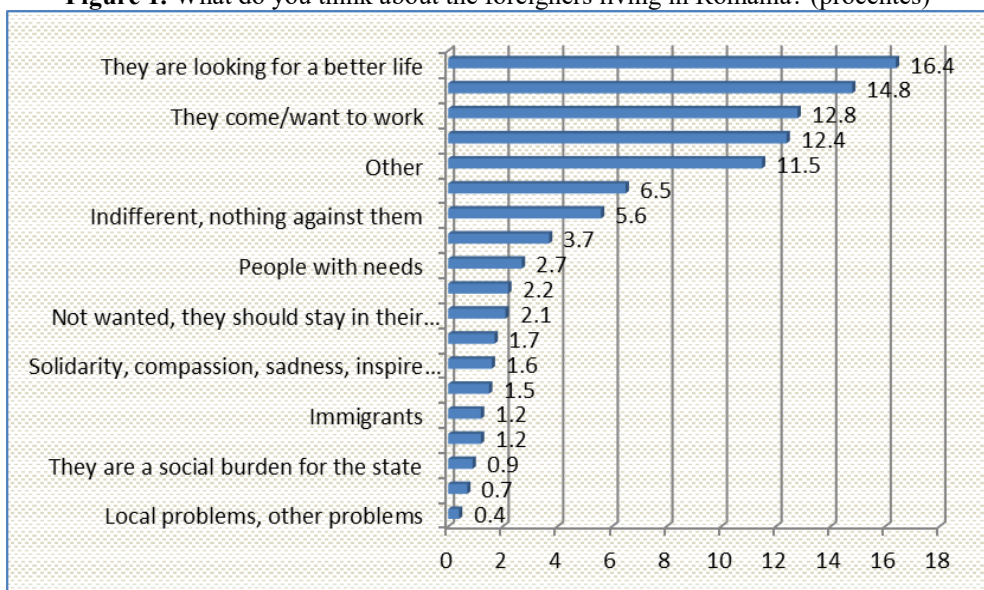
Immigration, understood as the movement of people to a different country or region than the one where they were born, in order to establish themselves there for a long time or permanently, has become common practice. Immigration in terms of motivation is a complex and varied phenomenon, but there are certain factors often invoked, such as economic prosperity, political reasons, family reasons, the need to escape conflict or natural disaster, or the simple desire to change the environment and lifestyle. However, this change of the social context also requires the change of the cultural environment, which involves the adaptation to attitudinal and behavioral habits or patterns of the destination societies. The societies of destination are also reactive, imposing their social norms to newcomers and often considering that emigrants have the duty to adapt themselves to social norms, while their acceptance is a favor for which the emigrant must have feelings of unconditional gratitude and appreciation. Certainly, in most cases the asymmetries between the emigrants' aspirations and reality give birth to discontent, manifested in varied ways and with different intensities. On a personal level, however, immigration is a costly process both materially and emotionally, requesting seriously the individual's personal resources. Beyond that, in many cases it appears that people are not entirely ready for networking within a new social environment, fact which increases the feeling of insecurity and dissatisfaction with a situation that seems irreversible, a rebound involving high costs (such as job loss, assuming failure, social negative effects, depletion of material resources for the process of adjustment etc.)

The process of integration in a new social environment, the adaptation of emigrants to dominant cultural models involves great, long-term efforts. The definition of the concept of culture is itself a complicated endeavor. The debates in social science are well known regarding the definitions of the term and its implications on national ideologies and public policy practice. Kluckhohn and Kroeber in 1952 recorded no less than 161 definitions of the concept of culture (Kroeber, Kluckhohn 1952). A well-known definition of culture was formulated by Geertz, who understands it as being "a model of historical meanings transmitted and manifested through symbols, a system of inherited concepts, expressed in symbolic forms through which people communicate, transmit and develop knowledge and attitudes about life" (Geertz 1973). We reminded of this definition in order to argue, relying on it, on the complexity of the phenomenon of adaptation to a new cultural environment. It is sufficient to point out that this system of collective conceptions is transmitted from one generation to another and expressed through symbolic forms, fact which implies a specific attitude of parents towards children, which is not found in the relationship between natives and emigrants. At the same time, we are convinced that the problems related to the accuracy of transmitting messages of any kind exist within any social environment, even more so when it comes to transmitting these messages to external social groups. All these considerations lead us to conclude that the difficulties of integrating immigrants have sufficient objective dimensions, in addition to the subjective ones, pertaining to the domination instinct specific to human condition and to the instinct of conserving resources.

There are important studies on migration highlighting the psychosocial characteristics manifested mainly by those who are involved in the effort of adapting to new social environments. We can highlight the theory of anxiety and uncertainty control developed by William Bill Gudykunst that focuses on the interaction between the members of a cultural group and those who do not belong to this cultural group. Effective communication involves the correlation between the intention of transmitting the message and its interpretation. Communication is effective as long as the person who interprets the

message assigns to it a relatively similar meaning as the one intended by the sender. The cause of misunderstandings and obtaining inefficient communication is the effect of insecurity and anxiety. While uncertainty is related to thinking, anxiety is linked to emotions. Uncertainty includes doubts about the individual's ability to predict the outcomes of interactions with a stranger. Anxiety refers to feelings of worry, tension, fear in relation to what might happen in the interaction with a stranger (Gudykunst, Mody 2002). These forms of behavior and attitudes manifested in the context of interactions between social groups which belong to different cultures actually highlight the very existence of natural difficulties of intercultural relating forms. Therefore, in the context of multicultural societies, as it is case of the EU, the knowledge and constant monitoring of forms of manifestation of social representations related to different ethnic groups in general and groups of immigrants in particular, becomes a mandatory and necessary action for the vitality of a multinational social space.

**Figure 1.** What do you think about the foreigners living in Romania? (procentes)



The practical analyses we propose below are primarily concerned with the way in which the Romanian society is manifested in the context of interactions with external social groups. The study we propose represents a secondary analysis which has as source the database developed while carrying out a "Study on the immigration phenomenon in Romania. The integration of foreigners into the Romanian society " conducted by Soros Foundation in partnership with the Romanian Association for Health Promotion (ARPS) in 2011, presents the awareness degree of immigration and recommendations regarding the support of integrating migrants with legal right to stay in Romania. The study was designed in order to collect information through the survey based on questionnaire carried out a sample of women and men aged over 18 years, nationally representative, with oversampling in the communities (towns or areas of towns) where we register the presence of immigrants: Bucharest, Iași, Cluj, Timișoara, Constanța, sample of 2000 subjects in total. It has used a standard nationally representative sample of 1,500 people aged over 18, men and women from urban and rural areas. The sample has three stages,

stratified in the first stage (region, residence environment, type of locality). The approximate number of selected towns: 200. (Alexe, Păunescu 2011)

In describing the attitudes of Romanians about the phenomenon of migration, figure 1 is a full perspective. Respondents have the possibility to find themselves opinions in eighteen distinct variants response and from what we can see they exhibit extreme variations in the following statments "They are looking for a better life" (16.4%) and "local problems, other problems" (0,4%). Respondents were asked to choose one variant of answer, the one that best characterizes their point of view. Analyzing the extreme choices we observe that feeling with the highest frequency is represented by a neutral attitude, while the least Romanians raised prospect is negative, which sees immigrants as a source of problems. On the whole perspective, the answers of Romanians to the offered choices, they can be grouped into three categories: positive opinions about immigrants ("They are good thing, Necessary for Romania", "cultural diversity", "people with Needs", "Solidarity, compassion, sadness' or Even "THEY come / Want to work"), neutral opinion about immigrants ("people like all the rest, good and bad," "They are looking for a better life", "indifferent, nothing against Them", "imigrants" "respondent mentioned the race, a nationality") and negative opinions about immigrants ("poverty, filth, hunger", "They are taking away our jobs", "not wanted, they shouldnt stay in yheir countries", "too many", "deliquency" "they are a social burden for the state", "local problems, other problems").

**Figure 2.** Please tell me your level of agreement with each of the following statements (procentes)

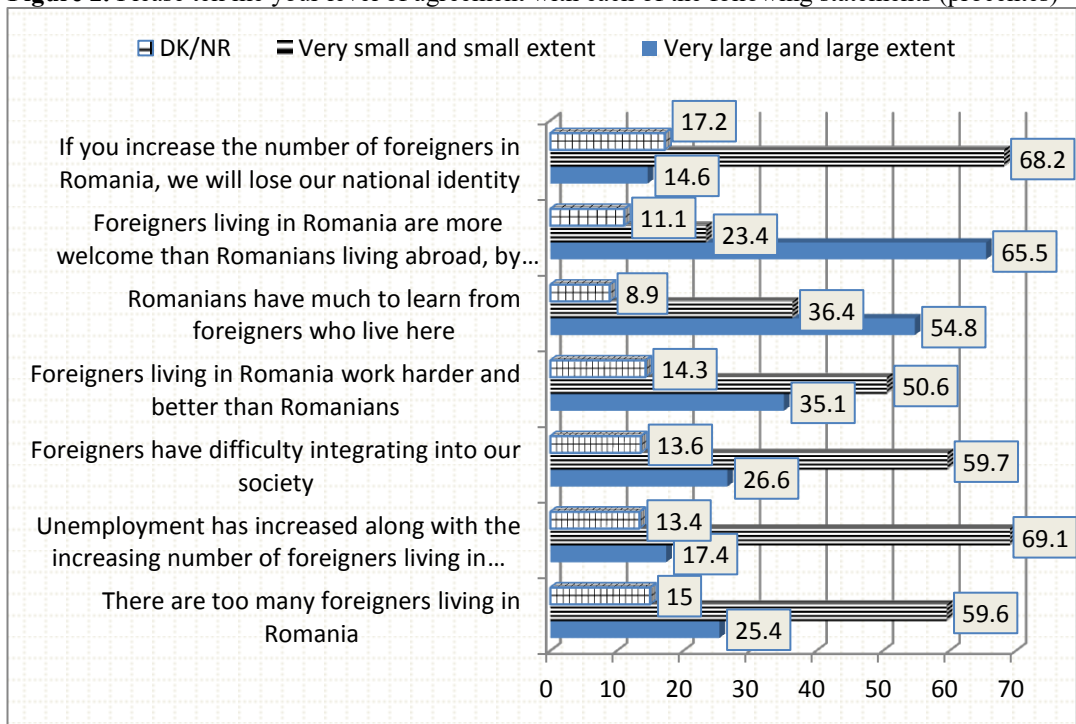
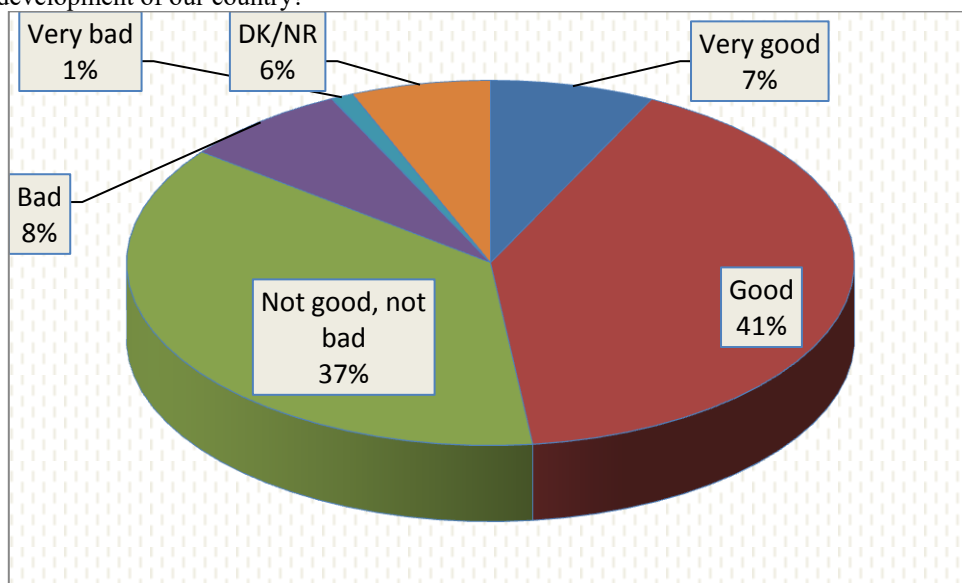


Figure 2 contains answers to a number of considerations which describes fundamentals of multicultural relations in general and Romanians' attitude towards immigrants in particular. In the applied questionnaire the questions were provided with five possible answers, but to highlight better the attitudes of Romanians towards immigrants, we merged this variants into three categories: large and very large extents,



very small and small extents and do not know the answer. We can see that only 14 % of Romanians see the foreigners to be a threat for the national identity. Regarding the statement “If you increase the number of foreigners in Romania, we will lose our national identity” most of respondents (68,2%) are considering a very small and small extent to be real. Also very few Romanians think that “Unemployment has increased along with the increasing number of foreigners living in Romania” (17,4%) while the most of Romanians (69,1%) are thinking this can be a problem in a very small and small extent. Also most of Romanians don’t think that foreigners are too many in Romania, Almost 60% are saying that this can be real in a very small and small extent. It is interesting to see that Romanians don’t think they have much to learn from foreigners who live in their country. Most of respondents (54,8%) think this is true in a very small and small extent. If there was at one time an inferiority complex that Romanians have expressed regarding foreigners, it seems to have disappeared.

**Figure 3.** What kind of influence do you think the presence of foreigners living in Romania has on the development of our country?



We can see that 9% of Romanians have bad and very bad feelings about the presence of foreigners living in Romania, which is not a big percent. Moreover 41 percent of Romanians has good feelings in this matter.

**Table 1.** The most important similarity between immigrants and other foreigners living in Romania? (percentes)

They are far from their friends and families	26,2
They face the same prejudices	8,8
They have a modest standard of living	8,9
They came in the search of a better life	24,4
Other similarity	5,5
DK/NR	26,1

An important feature of the Romanin social environment is multiculturalism. In Romania are living for several generations (hundreds of years) along with majority

population, a large number of ethnic groups (Hungarians, Rroma, Slovaks, Ukrainians, Germans, Turks or Hebrew). Although the term "foreigners" is not properly used to describe these groups (they are at home, being born and raised in Romania), the study authors intend to identify Romanians' perception about the possible similarities between indigenous ethnic groups and the groups of emigrants. Such an approach could be interesting from the perspective that indigenous ethnic groups may constitute a basis for more efficient and faster integration of migrants into Romanian society.

**Table 2.** Extent do respondents fit the „immigrant” profile for each attributes (percentes)

	Very small extent	Small extent	Large extent	Very large extent	DK/NR
Hardworking	4,9	19,8	51,9	10,5	13
Lazy	23	48,2	11,8	2,8	14,2
Rude	19,5	47	13,4	3,3	16,8
Religious	7	21,4	39,1	12	20,6
Friendly	3,3	18,7	51,8	11,7	14,4
Educated	2,9	18,7	52,9	12,5	13
Unevolved	35,9	40,1	7,4	1,6	14,9
Thieves	29,8	37,5	10,9	4,3	17,4
Honest	5	20,3	50,9	8,3	15,6
Civilised	2,9	15,1	56,2	14,2	11,7
Violent, aggressive	30,2	40,4	9,8	2,5	17,1
With common sense	3,4	17,3	53,8	10,3	15,2
Entrepreneur	2,5	13,1	50,8	18	15,5
Responsible	2,9	16,6	51,6	13,3	15,7
Courageous	2,7	14,9	48,7	17,3	16,3
Poor	15,2	41,9	20,1	6,2	16,6
Rich	9,4	25,8	39,5	9,1	16,1
Modest	5,4	28	33,8	5,4	27,5

In table 2 are included a comprehensive number of attributes depending on which respondents are asked to assess migrants from Romania. It is obvious to see at national level Romania is an open social environment, with a positive perception towards migrants. It is true that Romanian society before 1989 was not very accessible for immigrants and Romania after 1989 has never been a stake in this point of view, primarily due to the low standard of living and also because problems in accessing on the labor market. In terms of countries of origin, most temporary residents are from Moldova (17091), Turkey (7179) and China (4752), the three countries covering almost 60% of total countries of origin (the Romanian Immigration Office, 2010). Unlike the Romanian migration quantified at about 10% of the population, the immigration phenomenon in Romania has relatively modest. Data available at the end of 2010 shows that legal immigration has a share of 0.3% of the total population (total non-EU immigrants / total population) (Alexe, Păunescu 2011).

Global society can be understood as an evolved form of human society. Global societies have found forms of social construction that rely on persuasion rather than coercion. Extensive social spaces are built from the inside, through the will of the majority and based on democratic principles. Thus it is expected that modern global social spaces to be more durable than the old empires as forms of construction of expanded social spaces. Will of the majority and the principles of democracy involve continuous dialogue between the political structures of global society and public opinion. In this context, the role of public opinion and opinion surveys increases significantly (Drărbăneanu 2015). Romania represents an important potential in terms of integration of immigrants. This is

manifesting objective because our country was amid as a target destination of immigrants for a limited number of persons, compared to the countries of Western Europe. On the other hand the social perspective is permissive in Romania; we have here an area where attitudes about immigrants are mostly favorable. This involves an easy social integration and openness regarding intercultural communication.

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## WESTERN EDUCATION IN EASTERN TURKEY

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*Lia ÖZCAN\*\*\**

**Abstract.** *Education is the most important tool for shaping the new generations. As for Turkey, a country with a very strong culture and national spirit and whose language is very different than European languages, teaching new foreign languages is a challenge. But for a strong Turkey the usage of internationally used languages, particularly English, is a must. Therefore the children should be exposed to English language from early ages. This is being applied growingly in the Turkish education system from kindergarten level. This study aims to show how this is possible by applying the method of Helen Doron not only for school level – which is most common- but even from much earlier age, starting from 3 months, and continuing intensively through preschool. Helen Doron kindergartens are the institutions that successfully blend together the national education requirements and the need of learning English language in the most pleasant way for both the children and for the teachers.*

**Keywords:** *pre-school education, English language, Turkey, Helen Doron Kindergarten*

2016 has been a challenging year in most areas regarding relations between Turkey and the European Union. Its previous efforts in the direction of alienating to the European and international standards have been affected by the domestic political tendency and events during the past year. This led to a temporary freezing of the accession talks at a political level<sup>1</sup>.

This, however, does not mean that all the efforts made until now towards the western lifestyle had been affected. This paper intends to present a positive reality in the field of early child education, a reality that thousands of Turkish families chose for their children and live it with a maximum of satisfaction on a daily basis. The international chain of language schools “Helen Doron” has been present in Turkey for 8 years not only with language centers but extending and applying this worldwide appreciated method of teaching English to children to a new level, by opening full time kindergartens all across the country.

As the Helen Doron language centers are known for their unique and effective way of learning English language to young learners for over 30 years and in over 35 countries<sup>2</sup>, for Turkey this is a great example to prove that both the civil society and the

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<sup>1</sup> <http://www.europarl.europa.eu/news/en/news-room/20161128STO53408/eu-turkey-relations-%E2%80%9Cwe-are-entering-a-new-phase%E2%80%9D> (accessed on 26.10.2016)

<sup>2</sup> <http://www.helendoron.com/about> (accessed on 29.11.2016)

state institutions admit the necessity of learning English language from a very early age. English language is in itself a symbol of communication and openness for communication with the world, and more commonly to the western world. Starting from these premises, and focusing on the quality of early child education, Helen Doron Kindergartens might be the best example to prove the effectiveness of the efforts made locally in the direction of reaching international standards in education. European programs, such as Erasmus+ School Education are engaged in exchange of new practices and new forms of cooperation with other European partner schools for improving the standards and quality of education<sup>3</sup> on one side while the Helen Doron chain of language centers and kindergartens particularly provide western education focused on language development all through the country.

A study published in the “Language Education Policy Studies” journal shows the evolution and importance gained by English language both in teaching it in schools and being used as a language of instruction in Turkey. It was firstly introduced to Anatolian schools in the ‘50s then became the language of instruction for the first time in Bogazici University, which was founded in 1971<sup>4</sup>. Following this trend and the needs of the modern world, it became more common in schools at all levels and a requirement for access to the best universities in the country. Furthermore, English language very recently became a fundamental subject starting from kindergarten level, both in public and private sector, with very intensive and age-appropriate programs in the private sector.

This study has been prepared by the founder of Helen Doron Kindergarten in the most eastern location in Turkey based on her knowledge and vast experience in the field of child education and psychology and by teachers of English who are very familiar with the methodology used by this chain of language centers and kindergartens.

### **Education and Pre-School Education in Turkey**

Education in Turkey is carried out with a common program which is prepared and revised by Ministry of National Education according to school types and levels. Books which are instructed in this program are determined by Ministry of National Education. That is to say, in national sense an equal program is carried out for almost all individuals.

Including national components and universal basic information, equality, supply for the individual necessity and preparation of the individual for the future world of this program may be questionable. We believe these questions are on the front burner of the professionals and the units who are responsible for education in many countries of the world.

Education programs should be planned according to individuals we are raising for future world not only for universal necessities and lives but also responsibility of citizen of the world. At the same time, the quantity, quality and weighting of the education are issues that should be analyzed.

Following these questions, when we take a look at the pre-school education in Turkey, which covers the age range 0-7, the fastest development of a child in all aspects is noticed lately therefore the importance of pre-school education is emphasized recently.

<sup>3</sup> <http://www.ua.gov.tr/en/programmes/erasmus-programme/erasmus-school-education> (accessed on 29.10.2016)

<sup>4</sup> *This information was originally published on the website of the International Network for Language Education Policy Studies (<http://www.languageeducationpolicy.org>) as Chi, Yao-Kai. (2015). English Education in Turkey. In F. V. Tochon (Ed.), *Language Education Policy Studies* (online). Madison, WI: University of Wisconsin—Madison. Retrieved from: <http://www.languageeducationpolicy.org> (accessed on 29.11.2016).*

This period, in which the child is very curious and trying to discover the self and the world, is very important. Particularly late enrollment in the preschool system is a big loss for all parts including the children. In our culture, an ordinary family which is comprised of a working mother and working father, the children are left in the hands of uneducated keepers who are occupied with doing housework, this creating a surrounding where there is not enough stimulus for those children.

Due to this and multiple other reasons, preschool institutions, that have qualified program content and teachers, gain importance. Because individual education is no longer the same, the individual education is bearing national, world and universal responsibility by overcoming person.

In preschool education the basic aim is not that of filling the children with intense academic knowledge but of providing the opportunity to start knowing and discovering themselves, people, surroundings and their language with games and fun. Children ask, do, discover, build up friendship and are happy.

In this context, Helen Doron-Anka Gaziantep Kindergarten provides education service in concordance with the Turkish Kindergarten program, appropriate for our culture and support for being a citizen of the world, while 'Helen Doron Early English' program is the context in which children can learn English, the most valid language, according to the aims mentioned before.

Despite reaching limited number of children, we give education to our children and region, thinking that we are one of the best examples of education. Learning 2-3 languages apart from mother-tongue provides endless benefits for children. It helps them not to remain limited with their own culture, to reach world cultures and global citizens. In our education system, with continuous questioning and renovations, we are trying to provide proper complements for the grandiosity of child's brain.

All our efforts are focused on living in safety and peace, away from zealotry and judgment.

### **The importance of English language in pre-school education and the Helen Doron Kindergarten**

According to technological and cultural developments, knowing a foreign language has gained an enormous importance for the last 20 years in Turkey. People are supposed to know English as an international language not only for understanding and embracing these developments but also for professionalization. Regarding this, Turkey has followed many different paths about English education over the course of many years. If the English level of Turkish people is considered, it is obvious that most of them cannot speak English even after many years of training. At this point, we should focus on the problems about the system. First and the most important problem is that children start learning English very late. Because babies' brain develop until the age of 6 and within this period, substantial connections develop that can never improve after the age of 6<sup>5</sup>. Learning a language is very complicated, however babies can learn their mother tongues easily. A child's brain is different from an adult's brain in terms of the brain development speed. 'A 2-years old baby's brain has two times more synopsis than an adult<sup>6</sup>.' Babies can differentiate all the languages they hear. Their brains are programmed for learning languages until the age of 6. If they are given the chance of learning at least one foreign

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<sup>5</sup> <http://www.helendoron.com.tr/bebege-yabanci-dil-ogretmek/>

<sup>6</sup> <http://www.livescience.com/3497-bilingual-babies-early-edge.html> by Jeremy Hsu, April 2009

language, it will both help improving brain capacity and stay as a lifelong present<sup>7</sup>. In Turkish education system, children are taught in an exam oriented way. That is to say, they get theoretical education, but when it comes to practical terms, they are all stuck. People who have learned English for many years, cannot speak English fluently. The problem stems from the reason not only we mentioned above but also the way they are taught. In the Turkish Education System, language teaching is based on rote-learning. Children are supposed to memorize the sentence structure and vocabulary. They are even offered solutions for memorizing such as writing a word ten times on their notebooks. In this way, they can keep these memorized information in mind only until the exam. This is such a case that they answer the question 'How old are you?' with 'Fine thanks, and you?' because of rote-learning. At this point, Helen Doron Early English system has been a great solution for this problem in Turkey. This had put end to this issue with the idea that it is almost impossible to learn a language without the acquisition of that language.

Helen Doron method was developed by linguist Helen Doron in 1985 and has been a pioneer of English teaching in the whole world<sup>8</sup>. This methodology is based on positive guidance and repetition of what they hear starting from the age of 3 months. The source of inspiration for Helen Doron is Dr. Suzuki Method with whom her daughter started violin lessons at the age of four. The method aims to create an environment for learning music which parallels the linguistic environment of acquiring a native language<sup>9</sup>. He was calling this method, 'mother tongue approach' and leading children play violin before learning notes. Dr. Suzuki applied the principles of learning mother tongue to music training. Helen Doron realized the importance of this method in teaching English and adopted the principles such as parents' responsibility, encouragement with love, and continuous repetition as the milestones of Helen Doron Early English System. She thinks that babies and toddlers learn their mother tongue by hearing repeatedly. A foreign language can be learned in the same way as the mother tongue. By taking this idea into consideration, she developed different courses according to age groups from 3 months to 18 years. All of the programs are age-appropriate and also fully equipped.

Helen Doron Early English is really different in many aspects. First of all, the methodology which is based on repetitive hearing and positive reinforcement. Positive reinforcement makes children feel good, increase self-confidence and makes contribution to the development of self-esteem. In all age groups, lesson plans are prepared in a repetitive way. Children have the chance to reinforce the information they learn with many different games and activities. Children get a big kick out of learning in this system. Not only children but also teachers enjoy every single moment of the lesson. While having fun, they do not even notice the internalization of the language they are hearing. Although having fun is emphasized a lot, education is taken very seriously. All the teachers undergo many trainings given by a professional trainer group before they start teaching at Helen Doron schools.

First franchisee of Helen Doron Early English Learning Centre was opened in Austria in 1997. Today, there are more than 700 learning centers in 36 countries<sup>10</sup>. One of those countries is Turkey but with a difference. Turkey does not have only Helen Doron Early English Learning Centers. Turkey is the first country that started to apply Helen Doron methodology in kindergarten. Helen Doron Kindergartens embrace the idea that

<sup>7</sup> [http://www.bukisa.com/articles/68018\\_bilingual-babies-are-precocious-decision-makers](http://www.bukisa.com/articles/68018_bilingual-babies-are-precocious-decision-makers)

<sup>8</sup> <http://www.helendoron.com.tr>

<sup>9</sup> <https://suzukiassociation.org/about/suzuki-method/>

<sup>10</sup> <http://www.helendoron.com.tr>



game is the most important and effective way of learning. Through games, children improve their creativity and learn building social relations. They learn in an environment which they can experience and make sense out of their experiences. Children are encouraged to learn with examples and practice. Together with the ones that are taught in learning centers, there are many different kinds of lessons to fill in time productively. Maths, science, multi-music, RSM are the lessons taught in kindergartens, all in English. In maths lessons, children learn by concretization of abstract concepts. They have the chance to touch, feel and experience. Similarly in science, they do experiments. In multi-music lessons, they listen songs in 7 different languages. The purpose of multi-music lessons is not to teach all of the languages to children. It aims to help them be acquainted with the languages and to recognize what language it is when they hear someone speaking one of those. In RSM lessons which means 'Ready Steady Move', the purpose is contribute to children's muscle and body development with pilates and yoga. No other system matches English with sports.

### Conclusion

Education in Turkey has been subject to reforms recently and is being adapted to the international standards continuously. This study is showing how western education has been positively adapted to a strong Turkish culture and how the Helen Doron chain of Kindergartens successfully blends the international approaches in language training for children into the Turkish education, this being indeed a great achievement for this part of the world.

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## CONTENT AND EDUCATIONAL CONDITIONS OF GEOGRAPHY AS A SUBJECT REFLECTING THE COMPARISON OF SOME CENTRAL EUROPEAN COUNTRIES

*Erika HOMOKI\**

**Abstract:** *Regarding geography teaching in Hungary, significant changes occurred in both content and curricula in recent years. In the world of the Internet the subject lost its unique role in presenting the outside world. As a result, both pupils and teachers demand for the transformation of the content and teaching methods of the subject. The bridge role of geography between social and natural sciences may inspire the development of problem orientated views. This unique character of geography may help to enforce its position in public education. For advance in improving the educational situation of geography it is worth comparing it to that in other countries. As a result, a more realistic image might be obtained on whether the current situation of geography in Hungary is unique or it is part of wider changes of the subject in the region. Primary aim of the present paper is to compare geography teaching in some neighbouring countries in similar geographical and socio-economic locations: Hungary, Slovakia, Ukraine and Romania. Data of geography teaching in Finland, widely presented as an etalon due to its success are also included in the study.*

**Keywords:** *Central Europe, education of geography, Hungary, PISA, TIMSS.*

### Introduction

Problems of geography as a subject are not recent in Hungary. Its bridge role emphasized by geographers and the occasional negative attitude towards geography from public opinion and other scientific fields appear not for the first time in its history of education (Udvarhelyi & Göcsei, 1973). Similar problems emphasized early in the 20th century have not been solved completely yet.

This can be partly explained by the integrative space-perception required by geography the learning of which frequently presents a challenge even for qualified geographers as well. *“Geography taught at the end of the 20th century is not a descriptive but rather a pragmatic and synthesizing subject that presents a connecting link between subjects representing natural and social scientific information.”* (Probáld, 2004). In other words, behind the seemingly superficial character of making syntheses very deep and diverse knowledge and skills can be found the learning, interpreting and utilizing of which in the labour market are difficult. One further significant problem is that in the world of the Internet the subject lost its unique attraction as presenting the outside world.

The aim of the present research is to study how unique or similar are the above problems in Hungary and in some neighbouring countries located in a similar geographical (Carpathian Basin) and social-economic space (Slovakia, Ukraine, Romania).

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Certain studied parameters are characteristics of the education of the subject (class hours, grade of pupils, etc.) while others belong to the knowledge and attitude of the subject.

Geography curricular data banks of geography in the selected countries give the basis of the study. Structural analysis was completed by screening sheets studying the depth of geographical knowledge. Attitude and opinion related to the situation of geography in public education and its role in everyday life were also studied using questionnaire surveys. Following the publication of results for Hungary (Homoki & Sütő, 2011; 2014) the questionnaire and the screening sheet were asked to be filled in the selected countries. The following aims were set for the current study in comparing the results of the four countries:

- class hours, structure of classes,
- results in international surveys,
- situation of the subject in public education (content, subject ranks),
- opinion regarding the subject,
- comparing results of screening sheets in the studied countries.

## **Methodology of research**

### *General Background of Research*

The survey formed part of the work carried out by the Subcommittee on Geography Teaching, Section 10 of Earth Sciences, Hungarian Academy of Sciences completed in the academic year of 2009. The task was to measure the society's knowledge of geography, however, without standards available in Hungary. As a result, both the questionnaire and the organization of sampling were designed by the author. This research carried out in Hungary was extended to include the educational institutes of regions inhabited by Hungarians in neighbouring countries. The research studied the grade of influence of the educational framework (probably similar due to the former socialist regime) on the skills and opinion of pupils. Several countries were approached but the questionnaires and the screening sheets were filled in only in Romania (2013), Ukraine (2014) and Slovakia (2014).

Two questionnaires were compiled regarding the educational position and knowledge of geography. The *knowledge questionnaire* was composed of 19 questions covering the topics of secondary school graduation exam in geography (100/1997. (VI. 13.) korm. rendelet, 1997): geology, physical geography, orientation on maps, social and economic geography, regional geography, geography of Hungary and the analysis of global economics and environmental problems. The *opinion questionnaire* contained 6 questions, however, the number of answers was 159. **Closed-ended questions** partly with comparative ranking and partly with a semantic differential scale composed the document (Babbie, 2001).

The documents were prepared in cooperation with active geography teachers in the countries involved in the research in accordance with the curriculum of the given countries. Questions related to attitude and opinion were also assessed regarding their validity for the pupils of the given countries. Parallel to this a database was created related to geography teaching in the countries based on OECD data (OECD, 2013a; OECD, 2013b), published papers and the opinion of geography teachers (Bagoly-Simó, 2006; Fodor, 2003; Nemerkenyi, 2003; Oana et al, 2011; Tolmácví & Tolmácviová, 2003). For this some characteristics of the Finnish system regarded to be successful were also studied.

### *Sample Selection*

Conditions of sample selection in Hungary can be found in Homoki – Sütő (2011, 2014). In neighbouring countries contact was made with areas where Hungarians were

once the majority therefore samples cannot be regarded representative of the entire country. Questionnaires and screening sheets were returned from Beregovo District, Ukraine; Oradea and Satu Mare, Romania and around Kráľovský Chlmec, Slovakia. In the case of samples from abroad, questionnaires and screening sheets were filled in by every respondent. The Hungarian sample was filtered according to the sampling status of neighbouring countries yielding 266 people. Selection of the sample was performed using the multi-level group probability sampling procedure in Hungary. The sample meets the 5% error and 95% reliability level only in the case of Hungary. At 95% reliability the error is 8% and 10% in Slovakia and Ukraine respectively. Multi-level group probability sampling procedure was applied in Hungary while stratified sampling was used related to age in the rest of the countries (Babbie, 2001). The complete number of respondents is 668: Romania: 153, Slovakia: 156 and Ukraine: 93.

**Table 1.** Age distribution of samples in different countries (number of people).

	Hungary	Romania	Slovakia	Ukraine	Total
<b>14-18 years (pupil)</b>	58	52	151	83	<b>344</b>
<b>19-25 years (student)</b>	208	101	5	10	<b>324</b>
<b>Total</b>	<b>266</b>	<b>153</b>	<b>156</b>	<b>93</b>	<b>668</b>

The questions asked for information for various social geographic indices. These indices were used for on the one hand describing the social background of the respondents and on the other hand taking them into account in the evaluation of the results, assuming that these might have influenced the results. Age groups were identified based on key ages when structural changes in the education of pupils appear. The complete sample included pupils in secondary education (51.5%) in greatest ratio while second highest ratio was given by students in higher education (48.5%) (Table 1). In two countries – Slovakia (96.8%) and Ukraine (89.3%) – respondents were dominantly secondary school pupils. In Hungary (78.2) and Romania (66%) the ratio of students in higher education was higher. Therefore results and conclusions are related to these two age groups and the influence of sampling was indicated separately as proved by the statistical connection analysis later. It was presumed that age or currently active study of geography determine the actual knowledge level.

#### *Instrument and Procedures*

In Hungary it was possible to fill in the questionnaires both electronically and in paper based form. In the rest of the countries questionnaires were available only in paper.

On the basis of status questions the questionnaires can be applied for studying social relations: according to social stratification (*age, qualification, parents' qualification, place of residence, geography grounding, etc.*) and task type, knowledge level and topics. Data processing was performed using nominal coding for most answers of the survey. Certain questions required knowledge application or the recognition of relations while others focused on static data or facts.

For reliability a preliminary survey with a small number of samples was carried out. Problems in the course of this and the notes of the professionals in the Subcommittee were solved together. Results similar to that of the survey of Útóné (2007), the student research applying the questionnaire of the authors and that of secondary school and college tests of the students of the authors support the reliability of the survey results. Cronbach's Alpha tests (0.775 and 0.813) also confirmed the reliability of the final

version of the two questionnaire types. Validity of the content of the questionnaires is based on that the tasks were composed according to the topics of the curriculum framework (51/2012. (XII. 21.) EMMI rendelet, 2012) and the national curriculum (110/2012. (VI. 4.) korm. rendelet, 2012) adjusted to different knowledge levels.

If the respondent was the same simple descriptive statistics (*dispersion, median, mode*) were studied and analysis of possible significant differences among variables was performed (Ketskeméty & Izsó, 2005) using the parameters from the status questions and between the answers of the two questionnaires. When correlation was searched between the total score of the screening sheets and countries of respondents variance analysis was applied since the dependent variable is scale based while the independent variable is nominal. For the variance analysis the One-way Anova test was run using the software SPSS (Babbie, 2001; Ketskeméty & Izsó, 2005).

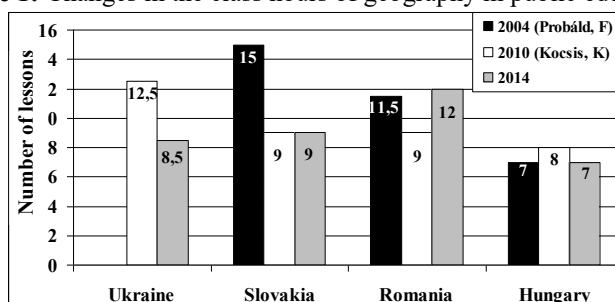
Teachers often presume that without exact background knowledge practical knowledge cannot be achieved. According to our experience, however, higher ratio of correct answers can be achieved in the case of practical questions even if the theoretical base is deficient in case certain knowledge is present. This has to be noted when practical education is established since solving everyday life issues requires such knowledge primarily. Based on this “*if learning starts with a problem to be solved and the solution of this problem requires the obtaining of new knowledge*” (Rocard et al., 2010) it may prove to be a great motivation for greater individual work investment.

## Results of research

### *Class hours and the structure of classes*

Class hours of the subject in public education were studied starting from the beginning of institutional public education (1777). It is worth noting that class hours are not always relevant to individual subjects but in integration with history and other subjects. Nevertheless one of the major problems can be detected clearly, namely that the weekly rate of class hours for geography decreased to its absolute minimum by today while content and skill development requirements did not (Figure 1). This makes the work of teachers even more difficult. Class hours in neighbouring countries changed a lot but still higher than in Hungary.

**Figure 1:** Changes in the class hours of geography in public education.



The problem is further intensified by the fact that pupils do not study geography towards the end of their secondary school education as geography is generally not taught during the last two years of public education. However, the synthesizing character and the reality related knowledge could be completed in the 17–18 years old age group. Structure of the curricula in the studied 4 countries reflects the following:

- Similar in *Romania and Hungary*: from local to general,

- In *Slovakia* and *Ukraine*: from general to regional.

Studying class structure, several similarities can be detected. Data in the study were classified in two ways: natural scientific subjects with mathematics and without maths. The following results were obtained in relation to the total length of public education (Table 2). Number of class hours is smallest in Hungary (10.55%). Highest is found in Romania and this can be the reason for the small deterioration of PISA results in Romania (Figure 2) in the case of the last three measurements and even more their score increased slightly. Ratio of natural sciences and mathematics is the same everywhere therefore the time frame becomes half except for Finland where the distribution of the time frame is 40-60% in favour of mathematics.

**Table 2.** Ratio of class hours (%) of natural sciences in public education considering 12 grades of pupils.

	Science without maths	Science with maths
<b>Hungary</b>	10.55	22.29
<b>Ukraine</b>	13.13	27.23
<b>Slovakia</b>	11.00	22.17
<b>Romania</b>	15.53	30.30
<b>Finland</b>	11.09	27.62

Although the class hours of natural sciences in Hungary are only slightly smaller than those in Finland (11.09%) where based on international measurements, a successful model is in operation, Hungarian respondents cannot reach good results. Distribution of class hours in public education in Finland, however, are based on a different concept than in Hungary. In Finland free selection of subjects appears already in secondary school. Therefore only the minimum values were considered in the analysis of the ratio of natural sciences in secondary education. Considering this research, however, primary school becomes more important because surveys study the knowledge of pupils at the end of primary school. Accordingly the number of class hours for the age groups of primary school is compared without those in secondary education. In this way, however, ratios are different (Table 3).

**Table 3.** Ratio of class hours of natural sciences in public education in primary school.

	Science without maths	Science with maths	Ratio of natural sciences
<b>Hungary</b>	8.74	22.09	<b>39.56</b>
<b>Ukraine</b>	11.37	27.97	<b>40.65</b>
<b>Slovakia</b>	7.89	20.76	<b>38</b>
<b>Romania</b>	12.95	28.21	<b>45.9</b>
<b>Finland</b>	12.64	26.77	<b>47.21</b>

Clearly Hungary and Slovakia are way behind the average (Table 3). If the ratio of natural sciences and mathematics is studied the difference of the system in Finland is clear. The time dedicated to natural sciences in total is almost 10% higher than in Hungary. At this point of the education structure the ratio of 40-60% characteristic for the entire period does not stand. Regarding the total class hours, Hungary belongs to the countries in which the educational time frame is the smallest among countries involved in international measurements (*A PIRLS és TIMSS*, 2012).

The direction of developments within the present regulations is determined by on the one hand that whether geography is classified into natural or social sciences and on the other hand, that whether it appears as a separate educational field or not in the curricula.

Therefore I studied the class hours of geography in relation to the classification of the subject (Figure 1).

- **Hungary:** separate educational field, however, its classification is not clear, variable by educational questions (7 hours).
- **Ukraine:** separate educational field, second lowest class hours (8.5) following Hungary.
- **Slovakia and Romania:** geography is part of the Human and Society educational field with higher number of class hours.
- **Finland:** geography is part of natural sciences but it is taught integrated.

In the studied countries if geography is part of other educational fields, class hours are higher (Figure 2) than when it forms a separate field.

#### Results of international measurements

According to the literature neither international nor Hungarian standards can be found for measuring knowledge and competencies related to geography. As a result only integrated natural scientific measurement standards used at international level are available for comparative studies. The most widespread of these are **TIMSS** and **PISA**. International measurement and screening sheets related to solely geography were prepared by colleagues of IGU-CGE in the second half of the 1980s known as **InterGeo II test** which was last used for a validated test in 1991 involving 23 countries.

This test was composed of 50 questions based on classic knowledge. With simple selection questions independent of curricula the test measured knowledge and skill regarded as geographical basic knowledge. The questions were grouped according to the topics in public education except for a block composed of 10 parts that measured geographical skills. In total 13679 people were involved in the survey. In Hungary 661 respondents, aged 14 years filled the screening sheets. Results were fairly good for the Hungarians. Average score value of correct answers was 55.7%. In general pupils from Eastern-Central Europe scored higher than average. Hungary with a score of 71.2% was second best following Czechoslovakia scoring 76.9% (Kormány et al., 1993). Romania and Ukraine were not involved in the survey.

TIMSS measurements used today has been repeated in every four years since 1993. Survey in 2011 involved 63 countries. The aim of the surveys is to study the mathematical and natural scientific knowledge of fourth grade and eighth grade pupils. Furthermore they are designed to obtain a view on the educational and learning habits both in the school and at home. Therefore questionnaires for parents and teachers have been used as well. Hungary has been involved in the surveys from the start.

According to the TIMSS, earth sciences (that is used in a wider sense than physical geography) is classified into natural sciences. As a result it measures only the physical geographical elements of geography. It is worth noting that regarding the complete test only 21% and 19% of the covered elements (194 and 240) are related to earth sciences in the case of fourth and eighth grade pupils respectively. 35% and 40% of the questions of both screening sheets are implicit knowledge. Important parts of the survey are background data regarding curricula content and their realization, preparedness of the teachers and available sources. These may present important information for decision makers in pedagogy. Scale centre point is 500 points (Balázs et al., 2012).

In the latest survey in 2011 Hungarian fourth grade pupils were ranked 10th which is the 4th best result following Finland, Russia and Czechoslovakia among European countries. Average score for Hungary has been unchanged in the last two measurements. It improved



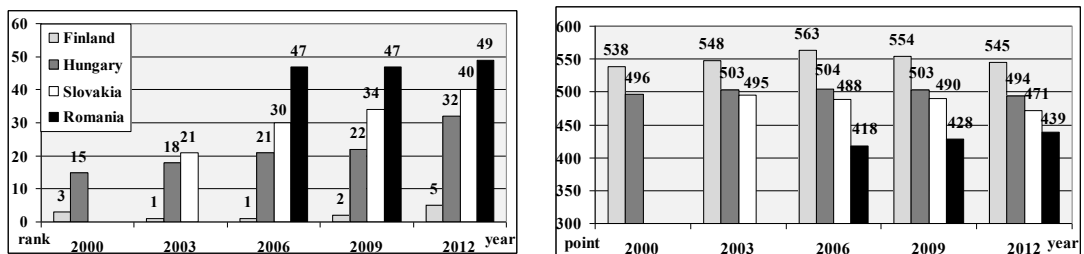
significantly, however, with 26 skill points compared to the first survey in 1995 (Table 4). Slovakia scored very similar to Hungary in 2011, while Romania, Ukraine scored one point lower each. Score of Finland regarding fourth grade pupils is exceptionally good (570 points) their earth scientific score, however, is slightly lower (566 points).

**Table 4.** Scores in the TIMSS survey before 2011.

Year	Hungary		Slovakia		Romania		Ukraine		Finland	
	4th year	8th year	4th year	8th year	4th year	8th year	4th year	8th year	4th year	8th year
1995	508	537				471				
1999		552		535		472				535
2003	530	543				470				
2007	536	539	526			462	474	485		
2011	534	522	532		505	465		501	570	529

Data source: <http://nces.ed.gov/timss/results.asp>

In 1999 Hungary achieved higher scores in the case of eighth grade pupils than the Finns, however, this turned upside down later. The only score of Slovakia is poorer than that of Hungary. Romania's score is 70 points poorer on average than that of Slovakia and shows a decreasing tendency. Ukraine shows improvement of 16 points by 2011, however, it is still second from bottom. Earlier the results of eighth grade Hungarian pupils belonged to the best. This was especially the case for natural sciences in which the knowledge of Hungarian pupils was one of the best ones among European countries following the dominant far-east countries. There are no special areas behind the drop of the Hungarian results, they deteriorated in all of the skills. Results of the Hungarian pupils, however, cannot be regarded as poor as they occupied the 11th position. Only Finland, Slovenia, Russia and England were in front of Hungary regarding European countries. The achieved score of 522 points in natural sciences is significantly lower than any of the former TIMSS surveys regarding eighth grade pupils. The score of 529 points for Finland (Table 5) for eighth grade pupils in 2011 is average, however, they are the best in earth sciences with 570 points. These data may support that geography generally requires synthesizing skills that are characteristic for older pupils.



**Figure 2:** Results of PISA surveys in the studied countries (rank and score).

Considering all these, it might be surprising that the results of Hungarian pupils are only mediocre in the case of the natural sciences test of PISA (measuring in every 3rd year since 2000 including more than 60 countries). Several countries scored higher than Hungary that were significantly poorer in the TIMSS survey. Both tests study the same age group as well, however, not in the same year. Difference between the two tests is the fact that "TIMSS surveys measure natural scientific education of eighth grade pupils while

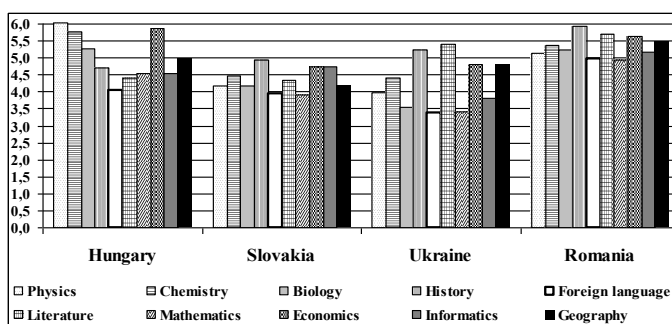
the PISA test seeks for indicators to estimate the chance of prosperity and success of fifteen years old youngsters as future citizens.” (Vári et al., 2002). PISA emphasizes the importance to place problems given to the pupils into realistic circumstances. As a result, their screening sheets are novel. Since these screening sheets were not widespread in public education in Hungary they were difficult for Hungarian pupils although not only for them. Considering the studied countries, Romania and Slovakia joined testing in 2006 and 2003 respectively.

Advantage of Scandinavian countries in Europe in the surveys is clear that is why I selected Finland for comparison. We could rightly presume that the educational and social traditions of Scandinavian countries prepare pupils for everyday social and public life and for stating opinion and solving problems better. Ranks of the countries selected for the present research deteriorates. In a small grade even the position of Finland became lower. Scores of Slovakia decreased by a few points while that of Romania increased slightly but it still remains in the last third in the surveys. Hungary dropped to 32nd from 15th while Slovakia to 40th from 21st (Figure 2). Regarding scores neither countries changed significantly but as the rest of the countries improve the same score gets lower rank. Ukraine has not been involved in the international measurements yet.

#### *Opinion regarding the subject based on a questionnaire survey*

Results of the questionnaire survey were applied for analysing the position of the subject. Opinion on the ratio and importance of content categories in the involved countries was studied.

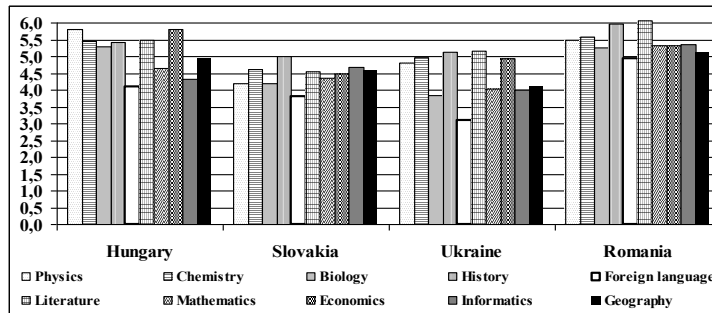
For the first important question related to the role of geography in further study and its usefulness in everyday life (Figure 3) subjects had to be ranked from 1-10. Subject ranks are not the same for the answers given according to the two points of view. Important role of mathematics and foreign language in further education can be observed in every countries. This is interesting taking into account the general rejectedness of mathematics by pupils. The two subjects are the top two in Slovakia, Ukraine and Romania followed by natural scientific and informatic subjects.



**Figure 3:** Rank of subjects according to their importance in further study.

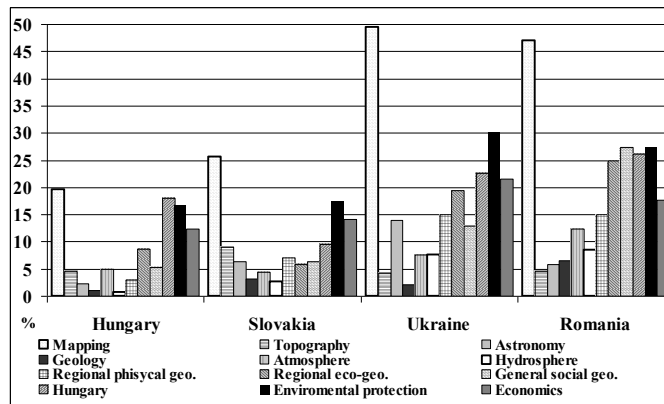
Regarding usefulness in everyday life, foreign language takes first place in all of the four studied countries (Figure 4). History and literature are ranked last in the three foreign countries. Interestingly in Hungary public economics can be found between these two. Considering natural sciences physics and chemistry are ranked lower while biology and geography are ranked higher. Mathematics, informatics, biology and geography are involved in the first five positions except for Slovakia where physics and public economy are involved among the first five while informatics and geography is excluded. In general,

geography is in a good position among natural scientific subjects and this is also supported by a Lithuanian and Latvian survey (Lamanauskas et al., 2004).



**Figure 4:** Rank of subjects according to their usefulness in everyday life.

The last highlighted question is related to geographical topics for which the most important three of the topics in a table had to be selected and ranked according to their usefulness in everyday life. Answers for topics were organized independent from their position (Figure 5). Dominance of mapping topic seems to be clear. Another trend indicates that the social parts of geography leave the natural scientific topics behind.



**Figure 5:** Cumulative ratio of the three most useful topics.

As could be expected the knowledge of the given countries (HU, RO, SLO, UA) and environmental protection topics were evaluated as important and useful in every sample. Regarding Hungarian results, the topic of Lithosphere was regarded least useful while this topic receives 9% of the class hours which is the highest value of topics taught in Hungary. Worst positions among topics were occupied by hydrosphere, Lithosphere and topography in Slovakia, Ukraine and Romania respectively.

#### *Comparison of the results of screening sheets of the four countries*

In general (analysing the details would require another paper), results do not differ significantly according to the basic statistical parameters. Maximum score for the screening sheets was 82 points out of which 75 points was achieved by one respondent in the Hungarian sample (Table 5) but the standard deviation is higher than the other countries.

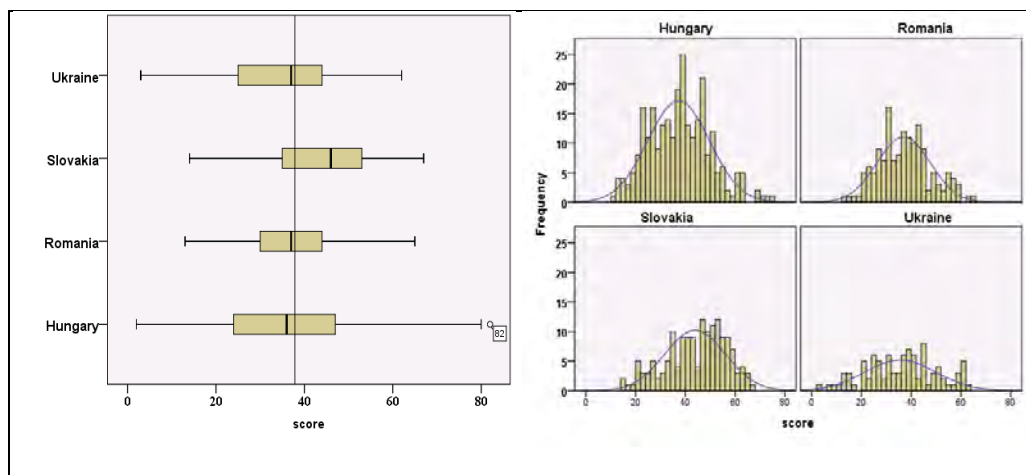
Samples show normal distribution (Figure 6), however, based on the mean and median values the Ukrainian and the Romanian samples were shifted slightly downwards. The Hungarian sample has a moderate mean value of 40.5, it shows the standard deviation value and outstanding values at around 25 and 50 points. Such outstanding scores were

achieved generally by students in higher education. Highest average of 44.2 points (51.5%) was scored by the Slovakian sample with more stable knowledge based on the smallest standard deviation value. Reasons for the better results of Slovakia could be revealed only by further research.

**Table 5.** Basic statistical parameters of replies of the screening sheet.

	Hungary	Romania	Slovakia	Ukraine
<b>Mean</b>	40,54	37.24	<b>44.20</b>	35.73
<b>Median</b>	39	37.00	<b>46.00</b>	37.00
<b>Std. Dev.</b>	<b>15,46</b>	<b>10.89</b>	12.15	14.33
<b>Min.</b>	11	13	14	3
<b>Max.</b>	75	65	67	62

According to analysis of variance, results show relationship with place of residence, gender, qualification of parents and country as well. There was a statistically significant difference between the four countries as determined by one-way ANOVA showing medium effect size ( $F(3) = 23.936, p = .000, \eta p^2 = .063$ ). This paper studies age groups only. (Best results in Hungary were achieved by respondents aged above 46 years, however, the ratio of respondents filling the tests is low unfortunately thus the data is not suitable for comparison.) In Romania no difference can be observed between the two age groups regarding average score (37 points, 45.1%). In Hungary students in higher education scored 2 points higher than pupils in secondary education (34 points). Highest scores in Slovakia are surprising as class hours are not the highest (Figure 1) and only pupils in secondary education were measured (Figure 1).



**Figure 6:** Distribution of replies for the screening sheet.

## Discussion

The number of class hours of geography is smallest in Hungary and highest in Romania. Higher number of class hours, however, does not mean necessarily better results as shown by the results of PISA and TIMSS surveys and our own survey as well.

Both Romanians and Hungarians showed decreasing scores in TIMSS measurements while Ukraine and Slovakia performed better by 2011. Scores of Hungary, however, are still better than that of the rest of the studied countries. Although natural scientific scores in the PISA survey varied around similar scores, all countries dropped gradually. This can be explained by the increasing number of countries involved in the surveys and also by that the

educational structure of some countries was improved significantly because the social-economic role of education was recognised. Future scores of Hungary in the surveys in 2015 and 2019 are doubtful as the time frame of environmental science is only 1 class hour per week for first to fourth grade pupils. Gradually decreasing results of understanding text in the PISA test may appear in the success rate of replying to the natural scientific questions. The problem is further intensified by that the number of natural science classes and that of geography within it was reduced (Figure 1) in secondary education as well as in primary education in the course of educational reforms both in Hungary and Slovakia. On the basis of the difference between the scores of the PISA and TIMSS scores, it can be stated that *“high level of natural scientific knowledge obtained during the first eight grades of public education alone does not guarantee high level of problem solving and practical skills for pupils”* (Vári et al., 2002).

Based on the results of our own screening sheet, fresh knowledge seems to be more important than the lack of knowledge (to be learnt later) in replying the questions of the screening sheet as supported by the highest scores achieved by Slovakian secondary school pupils. On the other hand, this can also support the opinion that high ratio of knowledge will not survive the time of education. A significant part of knowledge is lost when students enrol for higher education therefore it cannot be used in adult everyday life. Scores of the Hungarian sample are lower than those of the neighbouring countries despite that fact that this sample involved respondents with geographical qualification and students studying geography.

Position of geography in the ranking of subjects seems to be good in all of the studied countries, however, its rank in public education is not so good. Transitional classification of geography is also reflected by its position being generally better than natural sciences (except for mathematics) and worse than most social sciences. Evaluation of its role in further education and in everyday life could be explained partly by the bilingual environment near the border in Slovakia, Romania and Ukraine. Important role of subjects included in school ending exams can be detected in Hungary in the high position of literature (and grammar) and history (Figure 3) and in the rejectedness of natural scientific subjects. The limited role of geography in admission to higher education (accepted only in trainings related to earth sciences) may also contribute to the poor position of the subject. Its slightly better position in the rest of the studied countries can be explained by the pre-school-ending exam system. The exceptionally good position of foreign language in the usefulness of subjects in everyday life can be explained by the foreign language requirements nowadays – diploma, taking jobs, borderside regions. Low rank of basic natural scientific subjects could be the reason of the widely experienced deficient natural scientific world concept. In summary, there are some differences between the usefulness of subjects in further education and in everyday life. Better rank of geography among natural sciences can be explained by the increasing travel possibilities and the association of geographical contents with everyday issues as well.

The position of geographical topics, however, is also the result of stereotype views: maps belong to the geographers and represent a quasi equal term for geographical skills.

Another fundamental problem in Hungary in my opinion is that the basics for geography in primary school taught in the complex subject called environmental knowledge – that includes the four natural sciences – shrank to only one hour per week that takes natural sciences into a position lower than that of subjects teaching skills. This completely ignored fact is a brutal public educational interference because it limits significantly the advancement of the natural scientific concept of pupils that will have far reaching social

consequences in the life of future generations (Lamanauskas et al., 2004). In Hungary, however, due to the very early demand for specialization (conditions of further education appear at early stages of education) if pupils do not meet natural sciences and thus positive attitudes do not develop the task of teachers specialized in each of the natural sciences will be very difficult or almost impossible. To melt prejudice towards natural sciences and to fill the lack of knowledge and skills require some really charismatic teachers. Conditions of teachers' training have the opposite effects on future teachers.

In comparison with the successful Finnish example defects in grounding natural sciences in primary school are clear. Apart from this the following summary seems to be very informative on the circumstances of public education (Mihály, 2009). As a result of the analyses at that time, the incredible success of education in Finland could be explained by the followings:

- "Equal chances are ensured in Finnish education independent of gender, economic and geographical location and mother tongue;
- Educational institutes of the highest level can be equally accessed in every region of the country;
- Education is completely free;
- Participation in secondary level education is also general;
- Leadership of education is centralized, however, execution is adapted to local conditions;
- Education is interactive and cooperative characterized by partnership at every level;
- Pupils receive individual support for not only learning but for helping their social needs as well.
- Assessment of school performance is development orientated, ranks are not used;
- Teaching in schools is carried out by highly qualified teachers with autonomous personality."

### Conclusions

The double character of geography was a problem as early as the turn of the twentieth century indicating that this is not a recent problem. At national level more cooperative behaviour of the professional public with the representatives of the associated subjects would strengthen the positive attitude. In order to enforce the position of the subject it should be emphasized towards the public and decision makers that due to its content and synthesizing character geography should provide the basis for orientation in both the natural and social environment. Regarding international surveys, no standard is available for geography, however, it would be necessary to measure this field with its own screening test again.

Another problem breeds from the fact that the knowledge of the science field is partly covered by physics, natural history and history as well apart from geography (Udvarhelyi & Göcsei, 1973). By today this type of overlap endangers even the reason for the existence of geography. If so many connection points can be found in the curricula of chemistry, physics, biology and geography it would be reasonable to re-establish these relations and restructure the timeframe of the subjects.

The above are supported by the Finnish model. Apparently a stable educational background is essential. This is one of the decisive factors that is missing currently in Hungary. In Finland education has a high prestige and is considered to be a national case where schools and teachers have the trust of the society and they have both financial and moral respect. In contrast, teachers' training in Hungary deteriorated with the introduction

of the Bologna system. This might be caused by that some parts of BSc and MSc structured education have been applied but the training as a whole has not been integrated into education and schoolwork.

It is highly important to emphasize the role of natural scientific training early in primary school. In my opinion in Finland great emphasis is placed on teaching natural sciences in the early stages of education while later the number of class hours for natural sciences is roughly the same as in the studied countries. Without it teachers later try to make individual subjects popular “too late”. Cooperation is required with primary school and kindergarten teachers’ training institutes. Negative attitude towards natural sciences make the teaching of the individual subjects more difficult or even impossible. The current class load of teachers teaching first to fourth grade pupils, the pointless high number of class hours and strictly limited timetable for pupils, theory based teaching, low number of class hours for natural sciences radically misleads the pupils’ attitude of “getting to know” the world. Interest in the subjects should be maintained and the geographical skills should be developed by applying methods that fit less into the framework of the school system and introducing attitudes preferring practical knowledge in education.

Based on the responses for the opinion questionnaires restructuring the topics of geography as a subject could be timely and this should affect both ratios and content considering demand and professional aspects (*on the basis of international trends and educational research*).

The question is whether this co-thinking reaches the decision maker education political élite who determine the framework or not. If they ignore experience from practice it is feared that the opportunity of the education of natural sciences and geography within it loses its chance to catch up with the higher international standards in the long-term.

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## THE ROLE OF ASSOCIATIONS IN PROFESSIONALIZATION PROCESS OF EVALUATION

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**Abstract.** *For the last two decades, professional associations played a very important role in promoting evaluation of public policies and programmes as a discipline, strengthening the evaluation capacities in order to increase the usage and the quality of evaluations studies as well as in contributing to the development of the evaluation culture at national level. One of the dimensions that raised the interest of theoreticians in relation to the involvement of professional associations was their contribution in terms of professionalization of evaluation, what are the key elements that support this process as well as their dynamics. The aim of this article is to briefly describe the main concepts related to the discipline and profession of evaluation, based on the existing literature, with a focus on the role of professional associations in development process of evaluation, including related profession, especially at national level.*

**Keywords:** *evaluation, discipline, public policies and programmes, professional associations, professionalization*

Over the past years, the academic discourse on evaluation focused on defining evaluation as an autonomous discipline since there was registered a large number of persons that have this profession, since its core logic and associate methodologies were developed and used in many states in the last decade and since a substantial number of professional associations were established in this particular field. As a consequence, the evaluation discipline developed together with the evaluation profession. Evaluation both as an institution and a profession emerged in response to traditional social structures to the needs and demands of advanced capitalism, as Ernest House mentioned in his book *Professional Evaluation. Social Impact and Political Consequences* (House, 1993:28). The development of evaluation as a discipline is considered by most of the theorists a result of the influences and reform ideas promoted by New Public Management even if its dimensions cannot be related solely to this ideological current (Furubo, Rist, Sandhal, 2002: 5).

### ***The disciplinary nature of evaluation***

The evolution process of evaluation from its incipient stages to what we currently understand through this concept was influenced by a range of different, but important factors such as the national and international socio-political contexts. The development of evaluation worldwide is a result determined by different types of pressure, as Taylor-Powell and Boyd mention: external pressure deriving from international organizations in order to justify their interventions and internal pressure traceable to organizations that have evaluation as main activity, whose role is to develop the knowledge in this specific area of interest. A third type of pressure identified by Powell and Boyd can be understood in relation to the practice of

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evaluation processes, namely that the direction offered by this approach is promoted by the evaluation profession itself (Taylor-Powell and Boyd, 2002: 57).

Nonetheless, the professionalization of evaluation and its disciplinary dimensions remained a constant preoccupation for both theorists and practitioners. Nowadays this is even more a vivid goal for the professional associations created in the last decade since it was commonly agreed that it derives from practice contrary to the idea of being result of pure science (House, 1993: 83). Complementary to these ideas, Alkin considered that evaluation could not be studied and understood without taking into consideration the scientific component of this discipline, since *“there is a good deal of science in it too, but evaluation, as the term is defined in better dictionaries and used by those who use it carefully – is not just a science any more than it is just an art, or just a branch of literature. It is a transdiscipline, that is disciplines in their own right that also serve not only the sciences but other disciplines in extremely important ways – sometimes to such an extent that is characterized by saying that their contribution makes up a division/branch of a science”* (Alkin, 2013: 168). Alongside the transdisciplinary dimension of evaluation as it was promoted by Alkin, Scriven defined the term “evaluation” as being the name of a discipline. According to the theorist, evaluation involves the study and application of procedures with the aim of conducting systematic and objective evaluation studies. In addition, evaluation as a distinct form of investigative discipline differs from the traditional empirical enquiry deriving from social sciences or other existing associate research forms (Scriven 1991: 141). An interesting approach to be considered when explaining and defining the concept relates to the distinction between evaluation and other forms of social research. In this sense, evaluation in a less systematic and explicit form, as Donaldson explained, existed long before the appearance of social sciences and continues to exist in even more domains without relying on the work and methods used in social sciences (Donaldson and Scriven, 2009: 19). Contrary to the idea that evaluation represents a branch of applied social sciences, it cannot be understood neither as a study focused of human interventions nor as a subject whose intellectual origins are found in social sciences, as Scriven mentions: evaluation should be understood as a discipline much older and general. *“Evaluation is properly conceived of as a discipline in its own right, an analytical discipline like mathematics (on one hand, less precise, but on the other, much more general, useful and fundamental to human condition) covering a wide range of activities”* (Scriven, 1991: 142). Its appearance in social sciences should be comprehended as an application of a general discipline and not only as one using the methods deriving from social sciences. Moreover, according to Donaldson and Scriven, evaluation is expected to cross a period of gradual and profound transformation in relation to social sciences that will be influenced by:

- A division within the social science branch, based on a progressive dimension characterized by improved evaluation processes and conservative dimensions anchored in a less developed evaluation process use;
- A change in the meta-vision of social sciences that will consider more and more the newly developed perspectives;
- A reoriented focus on research questions that derive logically from the binomial: evaluation of social problems and approaches to both tackle and offer solutions (Donaldson, Scriven, 2009: 19).

In the attempt to define evaluation as a discipline and subsequently as a trans-discipline, Scriven made the distinction between “inter-discipline” understood as an integrated perspective deriving from or positioned in between the borders of two or more

disciplines and “trans-discipline” comprised as an integrated approach which involves more than two disciplines; the trans-discipline as discipline has an independent status and is also used as a methodological and analytical instrument in many other disciplines. In this sense, statistics can be considered a very good example in order to support the idea, programming or communication can be included also in this category of disciplines, and the most relevant example is logic, which is used as an instrument in all the other academic disciplines since it inevitably involves the relationship between conclusions and arguments (Scriven, 2008: 65). A trans-discipline understood as a theory, point of view or perspective applies to more disciplines as Coryn and Hattie also mention in the article *The Transdisciplinary Model of Evaluation*. The transdisciplinary model of evaluation described by Scriven is grounded on three main components, namely: “*disciplines (e.g., arts, humanities, social sciences, technology, natural sciences); fields of evaluation (i.e., product, performance, personnel, program, policy, proposal, and portfolio); and fields of application (e.g., education, health, human services)*” (Coryn and Hattie, 2008: 109).

### ***The evaluation profession***

The extent to which evaluation and implicitly the evaluator represent a profession was and it is still an extremely debated subject. As Stufflebeam and Coryn mention in their book *Evaluation Theory, Models and Applications*, one of the historical stage identified in the evolution process of evaluation was “*the age of professionalization*” during 1973 – 2004 period (Stufflebeam, Coryn: 2014: 31), as a consequence, it might be acknowledged that evaluation has a profession assigned. According to Frank Fisher, a professional is a person that applies a set of skills, competences and techniques with a view to analyse and solve a concrete problem (Fisher, 2009: 18). From a sociological perspective, a profession is understood as an area characterized by official and legal structures defining the modus operandi and the means of legal awarding of a profession to an actor such as lawyers or engineers (Saurugger and Eberwein, 2009: 11). Professionalization, according to Sanchez Salgado, is defined in a very broad and ambiguous sense. This concept takes different forms and can be understood as: regulation of a specific working area, a bureaucratization process as well as a power concentration between specialists (Sanchez Salgado, 2014: 123). Stufflebeam and Shinkfield mention that the evaluation profession appeared at the end of 20<sup>th</sup> Century which makes it a relatively a young profession, but even if it has its merits so far in terms of evolution, the development stage is not even by far finished (Stufflebeam, Shinkfield, 2007: 32). This idea is also shared by other theorists who state that even if the evaluation activities developed in different stages long before, evaluation as an institution fully organized including a profession and a discipline is acknowledged from the end of last century (House, 1993: 18). Moreover, Stufflebeam and Shinkfield note that in terms of systematic analysis of its history, the evaluation profession did not enjoy many notable efforts. It is also very important to encourage its evolution, like any other profession, to ensure the necessary flexibility to respond and adapt to the societal needs in a permanent change taking into consideration the developments that appear both at theoretical and practical level. Nevertheless if the representatives of a profession develop and maintain a traditional approach of their work, these may persevere in using a stagnant perspective that they have without taking into account the valuable lessons from the past and without stimulating and contributing to the innovations from a specific domain, having the opportunity to frequently return to more or less adapted methods used in the past (Stufflebeam and Shinkfield, 2007: 32). According to Sandra Mathison, the discussion on professionalization of evaluation remains open. In this sense, the author

argues that the promotion of evaluation as a profession is one of the main goal of the professional association such as American Evaluation Association. However, there are theoreticians that do not agree with the idea that this field fulfil the traditional criteria based on which the evaluation can be considered a profession. The debatable nature of the evaluation status is understood both by the theoreticians and practitioners, some of them launching the idea that evaluation is only a process used in other professions (Mathison, 2005: 331). However, over time new approaches and methods were developed and even the educational curricula included academic courses and training programmes and last but not least, the number of professional associations that were created determines a new dimension of the professionalization approach. The internationalization process of evaluation, according to Fitzpatrick, Sanders and Worthen, influenced to a large extent the evaluation practice in relation to the process of adapting needs of evaluators to the national contexts as well as to the needs and expectancies of the stakeholders (Fitzpatrick, Sanders, Worthen, 2012: 49). In addition, as Boyle, Breul and Dahler-Larsen mention, the evaluation profession focused on both managing and conducting qualitative evaluation studies and usage of data and information gathered during the evaluation exercises as well as on influencing changes and inter and intra organizational development. This profession always reacted at the numerous changes registered on the political and economic scenes, taking into account the relationship between evaluation and governments, the connection of the profession with the state and policy makers, relationship that encountered difficulties in terms of insurance the necessary conditions for critical reflections and for development of its own cultural domain and discourse since the power balance characterizing this relationship was distributed uneven (Boyle, Breul, Dahler-Larsen, 2008: 190).

As the economic and political activities evolved, diversified and adapted to the needs of societies the professionalization process extended into new dimensions. As Fischer noted, the professions abandoned the initial occupational status and developed cooperation relationships with organizations and institutions that were subject to a managerial trend (Fisher, 2009: 15). Evaluation as a profession adapted to the national and international contexts and developed new directions. A very interesting finding is that evaluation practice extended in the last decades to the most remote countries of the world. As Chelimsky and Shadish note, in 1992 evaluation was acknowledged as a work field in national audit agencies in 188 independent states worldwide (Chelimsky, Shadish, 1997: 54). Darlene Rus-Eft and Hallie Preskill state that there are three important dimensions of this expansion to be taken into consideration (Russ-Eft and Preskill, 2009: 46-47).

One important direction relates to the evaluation goals, based on current perceptions and practices, transferred and transformed from supporting governments in achieving their objectives and missions to improving the effectiveness of the programmes, to strengthen the organizational learning and to influence the decisions on financial allocation, both in public and private organizations. "The effective management of evaluation", according to Compton and Baizerman involves practical expertise necessary to determine the implementation and usage of qualitative studies, development of qualified and performing human resources and supporting of influential and dedicated evaluation units in the long run (Compton and Baizerman, 2009: 13).

Another evaluation dimensions that influence its understanding, from the level of maturity as a profession perspective, refers to the increasingly high number of publications in the field. Besides the numerous books, studies in the area of interest, the appearance of journals dedicated to evaluation represents another evidence for the progressive path of this discipline. The most important journals, but not limited to, are:

American Journal of Evaluation, New Directions for Evaluation, Evaluation and Program Planning, Evaluation Review, Evaluation of Health Professions, Journal of Multi-disciplinary Evaluation, Canadian Journal of Evaluation, Educational Evaluation and Policy Analysis, Evaluation Exchanges etc.

A third aspect to be taken into account is the number of specialists involved in the evaluation processes which increased considerably in the last two decades. According to Stufflebeam and Coryn, in 1995, there were registered only five evaluation associations worldwide, including American Evaluation Association (AEA) in the United States and similar in Canada, Europe, Australia, New Zealand (Stufflebeam L. and Coryn, 2014: 5).

These organizations offer evaluators the opportunity to share their experiences and interests. Their members include evaluators, policy analysts, auditors, researchers involved in the knowledge creation and diffusion processes at international level. Through regular meetings and publications, the associations create the necessary premises to evaluators to disseminate their findings, to learn new techniques, to think about more general aspects as the role of evaluation in society from different perspectives, to promote professional ethical standards and to contribute to the development of the domain (Weiss, 1998: 14). From the establishment of the AEA in 1986, the number of members increased with more than 1000%, as Russ-Eft and Preskill mention. A very interesting aspect, note the theoreticians, relates to the number of evaluators that acknowledge evaluation as being the first or the second activity domain increased significantly in the last years. *"By 2000, 32 percent of AEA members identified evaluation as their primary discipline (AEA, 2007). By 2007, this number jumped to 49 percent (AEA 2008). These findings lead us to conclude that people are taking on more and more evaluation responsibilities within organizations or consulting practices and identifying themselves as "evaluators" regardless of their professional/organizational title"* (Russ-Eft and Preskill, 2009: 46).

Professional associations continue to develop and to interact with new areas with the scope of extending the presence of evaluation, especially in the public area. According to Kistler, AEA numbered in 2010 approximately 6000 members (Kistler, 2010).

### ***The contribution of associative structures in professionalization process of evaluation***

The interest and investments in the evaluation domain became a worldwide enterprise. In the last couple of years, more than eighty national and regional agencies were established providing necessary information about and promoting evaluation. With the aim of collaborating and bringing together different traditions in terms of evaluation processes, International Organization for Cooperation in Evaluation was created in March 2003. Initially it comprised twenty-four associations (Russ-Eft and Preskill, 2009: 47), but today IOCE numbers approximately 70 associative forms<sup>1</sup>. It was designed as a free alliance between the national and regional associations (associations, societies and networks) worldwide having the following goals:

- To create a form of leadership and evaluation capacity in the developing countries;
- To support the development and to promote the theory and practice of evaluation;
- To address the challenges related to evaluation identified at international level;

<sup>1</sup> <http://www.ioce.net/vope-directory>

- To support the evaluation profession as a general approach in order to contribute to the identification and solving identified problems<sup>2</sup>.

In addition to these factors, Segone identified other dimensions that influenced this extremely dynamic process of developing the evaluation dimensions: intercultural expansion of evaluation, recognition and validation to a larger extent of the evaluation profession, increased interest of the government representatives related to accountability towards citizens, measurement of the performances and increased transparency in relation to public policies implementation, a greater emphasis on the need to develop the evaluators skills, continuous debates on the methodological rigor and use of advanced levels of complex analysis systems in evaluation processes (Segone, 2012: 56).

All these aspects determined a reconsideration of national evaluation systems and influence relations between the stakeholders involved in these processes, recent studies focusing on the role of the organizations and national and international networks have in the evaluation capacity building process. According to Segone, organizations are changing agents and instruments supporting the reforms of the policies implementation processes (Segone, 2009: 26). Organizations play an important role in the monitoring and evaluation processes thus fostering the creation of professional associations (Segone, 2012: 27). The development of professional associations, as Grey and Jenkins mention, is an evidence of the intention expressed by the evaluation community to strengthen its core function and professionalize it with special emphasis on its philosophy, methodology and user needs. Consequently, there is a consensus related to the fact that for the last two decades evaluation clarified its scope and improved its results (Grey and Jenkins, 2011: 48). From a more practical perspective, Holvoet, Dewatcher and Gildemyn conducted in 2011 a survey that had as main objective data collection on activities implemented by the evaluation societies in order to achieve their objectives and to contribute to their mission, implicitly to professionalize evaluation. Thus, the main activities conducted by the organizations, identified by the respondents, were divided in six categories, as follows (Holvoet, Dewatcher, Gildemyn, 2011: 15):

*Education/ training/capacity building* (lectures, seminars and workshops for the members and non-members as well; small niche training for local NGO & CS as a group to promote evaluation; educational programs in cooperation with the local and foreign educational institutions);

*Research* (research studies and support to national institutions in the planning and development of monitoring and evaluation systems; evaluation journals, research, systematization and dissemination);

*Policy Advisory Work* (designing monitoring and evaluation system as well as programme evaluation for local and international institutions; building capacities of local government staff as a means to improving development effectiveness);

*Advocacy* (developing and advocating evaluation policies, legislative and regulatory acts in the field of evaluation and monitoring; active participation in the process of development, advocacy and implementation of good practice and international standards in development evaluation, in liaison with other interested organizations);

*Stimulate evaluation culture* (active participation in the process of development, advocacy and implementation of good practice and international standards in development evaluation, in liaison with other interested organizations; debates on issues related to

<sup>2</sup> IOCE Stragic Plan 2008-2009, document available at:

[http://www.ioce.net/en/PDFs/IOCE\\_Strategic\\_Plan\\_%282008%29.pdf](http://www.ioce.net/en/PDFs/IOCE_Strategic_Plan_%282008%29.pdf), accesat 27.11.2016

monitoring and evaluation; advocacy for more rigorous evaluations of development programmes and use of their results in development policy making among development decision makers in the country; reaching out to people, communities, sectors, organizations and entities for the furtherance of evaluation cause;

*Defend the interest of evaluators as professionals* (helping the professional advancement of members; dissemination of information of professional interest to national evaluators; organizing local members and stakeholder meetings; resource mobilization

*Networking* (forum for networking; maintenance of a platform for discourses on development and evaluation through conferences and dedicated workshops, communication (correspondence with members, development of website and administration of e-platform among others); participate in other international similar networks and forums; outreach and publicity (including recruitment of new members and forging stakeholder strategic partnerships).

Nevertheless, as Jacob, Speer and Furubo mention in the recently published research on institutionalization of evaluation, *“different professional organizations conduct different activities; they are not comparable in terms of membership, the intensity of their involvement varies significantly from one country to another. In reality, the existence of a professional association within a given country does not guarantee a strong national discourse on evaluation”* (Jacob, Speer, Furubo, 2015: 17).

### ***The role of professional associations in Romania***

As Boyle and Lemaire noted, the development of evaluation in central governments was as two-wave process. The first wave was characterized by the introduction of evaluation during 1960s in countries such as Canada, USA, Sweden and Germany. The second period started in 1970s and included states which made significant efforts related to evaluation domain, such as Denmark, the Nederland, Great Britain and France (Boyle and Lemaire, 1999: 1). In Romania, the activity of evaluation of public policies is relatively new in the administrative system and it was not subject of the two waves mentioned above, but more of a delayed wave influenced by the EU accession and the accommodation of the binding legislative requirements deriving from this new status (Cerkez, 2009: 117-118). According to the findings presented in the *Final Report on the Framework to Analyse the Development of Evaluation Capacity in the EU Member States*, by 2008, Romania had an extremely limited evaluation experience, but a great emphasis was put on the incentives and the strong commitments made by the relevant interested actors in terms of integration of evaluation in both EU financed programmes and national policy domains such as the adoption of the National Evaluation Strategy and establishment and continuous support to develop the evaluation professional association (European Commission, 2008: 169-170).

Although significant efforts were made by the relevant institutions in promoting and using evaluation in the policy making and programme implementation, several problems were identified such as: limited resources dedicated to evaluation function (both human and financial); restrained usage of information provided by the monitoring systems; limited capacity in terms of selection and defining necessary indicators; structural problems of the administrative system (eg. lack of information and communication (Cerkez, 2009: 135 - 136). Now, after ten years, the degree of maturity of evaluation culture in general terms and status of development of evaluation capacities at public policies level, in particular, represents a debatable subject. The institutionalization process of evaluation within the public policy system is considered to an extent a failure,

caused by the political and economic context that Romania faced starting with 2008 (Stavaru, 2015: 134).

Alongside the institutional and legislative approaches, the establishment of a professional association designed to contribute to the development of evaluation culture and national capacities represented an extremely important stage for the modernization of Romanian policy and decision making system. Therefore, in 2006 Evalrom (Romanian Evaluation Association) was created, being the first professional association established in Romania. It initially counted nineteen members, both from private and public sectors and by 2016 the number increased to forty-eight<sup>3</sup>. According to the information published on the website, the main goals of the association are:

- To promote the use of evaluation in public, private and associative sectors;
- To increase the transparency and accountability level of the governmental activities through systematic use of evaluation;
- To contribute to the development of evaluation capacity at national level;
- To promote quality in evaluation and in the professional training dedicated to evaluation;
- To contribute to the development of new concepts, methodologies and innovative tools in the field.

In order to contribute to the development and professionalization of evaluation, during 2008-2015 period the activities conducted by the association mainly focused on five components, namely: facilitating debates, organizing regional seminars and workshops, training and project implementation. One important activity designed to directly contribute to the professionalization of evaluation that worth to be mentioned was the elaboration of a code of conduct for evaluators. Despite the efforts this activity did not achieve a concrete result, namely the adoption and usage of the code, the main causes identified being the limited experience of the local evaluators community related to the ethics of evaluation as well as an unexpected low level of interest for this subject.

Complementary to Evalrom, in 2010 RoSE (Romanian Society of Evaluators) was created with the aim of representing the interests of its members and preserve the independent nature of this specific services in order to develop a credible and professional market for evaluation of public policies, programmes and projects, both at national and international level. It is to be acknowledged that the association was a private initiative, founded by sixty-three members, presently counting sixty-seven, from all eight development regions<sup>4</sup>. Based on the information available on the website, the main objectives of the association concentrate on: maintaining a proper quality of professional standards according to the nature and particularities of the field, validation of evaluators competencies, professional lobby through decision makers with a view to formal recognition, based on legislative acts of the evaluations, both for program and projects. The results to be taken into account in relation to the professionalization process of evaluation are two collaborative projects with Albania and Macedonia which offered the opportunities for all partners involved to share experiences and implement innovative ideas related to professional framework of evaluation, gender perspectives in evaluation and institutionalization of evaluation.

A third associative structure was formally established in 2012 under the name of ADER (Association for the Development of Evaluation in Romania) at the initiative of an

<sup>3</sup> <http://www.evalrom.ro>

<sup>4</sup> <http://www.evaluatoriasociati.ro>



academic group within the National School of Political Science and Public Administration. Presently, the organization numbers twenty-nine members, professors, researchers, PhD candidates and practitioners. The ADER mission is to promote efficiency and efficacy in the public sector<sup>5</sup>. The objective of the association, according to the data on its website, is to provide knowledge in order to fundament and implement public policies through: developing the use of evaluation at national level; promoting dialogue between academia, civil society and public institutions; developing cooperation and collaboration with institutions that contribute to the development of scientific research in the evaluation field; increasing the transparency and accountability level of public policies by promoting the use of evaluation; developing evaluative research as a distinct academic discipline and profesionalization; promoting and supporting the development of evaluation capacity at national level. In terms of professionalization of evaluation, ADER had also the initiative to develop guidelines for ethical practice in evaluation in partnership with the Israeli Association for Program Evaluation, but the discussion on the structure and guiding principles of evaluation and evaluators did not had a rezult formally accepted by all relevant actors. In addition, ADER members shared with Slovanian Evaluation Society good practices in terms of developing a training programme in evaluation, based on the experience of the master programme implemented in Romania.

*As a conclusion*, despite the formal incetives luanched by the Romanian central administrative structures in order to promote the use of evaluation in the management process of public policies and programmes and the noticeable efforts made by the professional associations at national level to develop the profession, evaluation still needs significant efforts to be acknowledged, validated and used in accordance with its main objective, thus to contribute to social betterment through informed decisions. In this context, it is more and more obvious that the involvement of associative structures in professionalizing and promotig evaluation reprezent an extremely important force that should guide its progress.

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## JOURNALISTS AND POLITICIANS. COMMUNICATION IN A DEMOCRATIC CLIMATE OR MUTUAL CONTROL?

*Simona FER\**

**Abstract.** *Politics and Journalism are two major fields on which society has shown an interesting interconnection, over the years. Journalism is sometimes referred to as the „fourth estate”, and is seen by some as being crucial to the functioning of a healthy and fair society. The role of politicians is supposed to be the representation of those who elected them and to ensure that the concerns of that electorate are listened to, considered, and acted upon.*

*Nowadays, politicians are often not comfortable with the media, and at the same time, the media look at the government with disrespect whenever its freedom is tampered with. The governing powers are frequently in war with reporters and the reason for this is the suspicion that a free press could influence citizens to an extent of causing changes in that political sphere. This supposition is not accepted in journalism. The link between journalism and politics is therefore divergent, uneasy and sometimes troublesome.*

**Keywords:** *investigative journalism, political communication, media manipulation, electoral context, political campaign*

*”Were it left to me to decide whether we should have a Government without newspapers or newspapers without government, I should not hesitate for a moment to prefer the latter”.*

Thomas Jefferson

There exists a very thin border, such that with time, politicians and journalists cross the line interfering roles and moving from side to side. When they do that, there is somewhat complete achievement of different characters and thus, journalists have an unstable responsibility (Afolabi, 2015). We should mention that the people are the only censors of their political representatives: and even their errors will tend to keep these to the true principles of their institution. To punish these errors too severely would be to suppress the only safeguard of the public liberty. The way to prevent these irregular interpositions of the people is to give them full information of their affairs through the public papers and to contrive that those papers should penetrate the whole mass of the people. The basis of governments being the opinion of the people, the very first object should be to keep that right. Sometimes public opinion is in the place of law and restrains morals as powerfully as laws ever did anywhere<sup>1</sup> (Boyd, 1950).

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<sup>1</sup> In April 2009, the Papers of Thomas Jefferson, in partnership with Princeton University Press announced the launch of *The Papers of Thomas Jefferson Digital Edition* as part of the American Founding Era digital collection hosted by Rotunda at the University of Virginia Press. All the documents of the Jefferson Papers are now available in digital form.

Thomas Jefferson, the main author of the US Declaration of Independence, and the country's third president, once remarked and was probably right in suggesting that journalists are more important to society than politicians, and in some societies, the politicians know and fear that. Perhaps that is where the complications arise and compromise springs. Journalists feed their stories with information and they often have to obtain some of it from politicians. So the journalist is either put in the position of requester to obtain that information, is able to negotiate for it, or has to go undercover and find the truth on his own. The politician can decide whether to give or withhold the information. When it's a case of investigative journalism it is far more difficult for the politician to plug every possible leak and cover over every past trail<sup>2</sup>.

When it comes to covering politics, journalists often unearth information that the politicians don't want them to know. Publishing only the information the politician wants made public is little more than being a press officer or a peddler in propaganda. The real journalist is prepared to risk all in order to print uncomfortable truths, is able to back up their stories with undeniable facts and is committed to exposing incompetence, venality, lies and corruption. Perhaps this is what Thomas Jefferson meant when he placed such a high value on the role of newspapers (the media) in society. In doing so, it is crucial that journalists understand themselves and their own reasons, and that they subscribe to and apply a set of editorial ethics that ensure that all they do is done with integrity (Brewer, 2011).

In democracies, the role of the journalist is supposed to be to inform the public debate so that the audience can make educated choices. The role of politicians is supposed to be to represent those who elected them and to ensure that the concerns of that electorate are listened to, considered, and, where appropriate, acted upon.

**Fig. 1** Interdependence of politicians and media in a globalized world.



This figure assumes that media commentators are unbiased to present the news (classical role of the media and journalist) and people act rationally in their best interests, even though sometimes the media acts as a “yes man”. The figure 1 shows that the politicians-media relationship is closely, especially related to the debate on freedom of speech in a globalized, “liberal democratic” world. The figure 2 shows that the media’s responsibility is to connect equally the citizens and politicians, trying to create a balanced coverage during an election campaign to make sure that they listen to all parties, this being only the ideal model of the media

<sup>2</sup> *The Founders' Constitution* Volume 5, Amendment I (Speech and Press), Document 8, on [http://press-pubs.uchicago.edu/founders/documents/amendI\\_speechs8.html](http://press-pubs.uchicago.edu/founders/documents/amendI_speechs8.html), by The University of Chicago Press

**Fig. 2** Classical model of media and journalism

In such a political system, the journalist should act on behalf of the audience to ensure that politicians do their job. The journalist should be exploring and covering the issues that most concern their readers and listeners. In doing so they should include a diversity of voices and political opinions in order to offer the richest and most complete coverage possible. If they achieve that, they are more likely to offer journalism that enhances understanding and encourages dialogue and debate.

On one hand, politicians make decisions and take action on behalf of the public, on the other hand, journalists scrutinize those decisions and report the implications to the public. The politician has the upper hand in some situations: the release of information they think they control, but not in the case of the release of information that is out of their control. And the line between the two categories becomes increasingly blurred.

Unfortunately, in practice, most of the time the media plays different roles. It simulates transparency and doesn't serve the political values that motivate the "transparency", hides important information in a mass of manufactured political realities. Nevertheless, the political transparency is impossible without mass media coverage. Politicians, even governments can manipulate the coverage of information to achieve their political and economical goals through diverting audience attention (Chobanian, 2017).

### **Politicians use media in order to win elections**

The media have traditionally been understood to refer to the printed press as well as radio and television broadcasters. In recent years however, the definition has become broader, encompassing new media including online journalism, and social media. Citizen journalism is widely gaining traction, including in countries where traditional media is either controlled or strictly regulated. The media themselves have a right to report freely and to scrutinize the whole electoral process. This scrutiny is in itself a vital safeguard against interference or corruption in the management or conduct of the electoral process (The ACE Encyclopaedia: Media and Elections, 2013: 9).

In Serbia, for instance, several important independent media outlets contributed to the decline of Milošević's popularity. The B-92 radio station had offered unsparing professional coverage of Milošević and his regime since 1989. B-92 cofounder Goran Matić also played an instrumental role in establishing a regional radio and television network to distribute independent news broadcasts. Michael McFaul agrees that without these media outlets, popular mobilization would have been much harder (Mc Faul, 2005: 11-12).

Candidates and parties use the mass media for campaigning through sponsored direct access spots, paid political advertising, televised debates, use of social media, and other mechanisms. They also hope the media will voluntarily cover them because of the newsworthiness of their campaign activities. Political parties expend vast human and financial resources on planning and executing mass media campaigns (Political Campaigning Planning Manual, 2009).

Politicians are always quick to blame the media when a news story doesn't put them in a favorable light. But they use media to win elections by getting the exposure they

need to reach voters. Reporters have no choice but to cover the people chosen to lead government.

In election years, people who work in media should prepare themselves for the manipulation they'll likely face when a politician's quest for office runs head-on into the media's desire to seek the truth. Any candidate with enough money will spend some of it on TV and print advertisements. Just like all other ads, the purpose is to sell a product, not necessarily to tell the entire truth about the candidate. Across the globe, aspects such as politics (both current and historical), media literacy, access to electricity, wealth, geographic location, and culture all contribute to the wide array of national-level media landscapes. The nature of the media landscape will largely determine the nuances of the role that the media play in an election. These nuances include reach, political inclinations, and tendencies to set the terms of political debate.

That's no surprise, but you may not know about the rules that give a political campaign an advantage over the media. Thanks to campaign laws concerning the media, ad space has to be sold at the lowest available rate. Not only that, media outlets have very little control over what is said in a political advertisement, even if it is misleading or downright false.

The world of television and modern media has become a tool of de-evolution, propaganda and social control. The media play an indispensable role in the proper functioning of a democracy. Discussion of the media's functions within electoral contexts, often focuses on their "watchdog" role by safeguarding the transparency of the process, unfettered scrutiny and discussion of the successes and failures of candidates, governments, and electoral management bodies, the media can inform the public of how effectively they have performed and help hold them to account. In order to fulfill their roles, the media need to maintain a high level of professionalism, accuracy and impartiality in their coverage. Regulatory frameworks can help ensure high standards. Laws and regulation should guarantee fundamental freedoms essential to democracy, including freedom of information and expression, as well as participation.

The role of media in providing this platform for debate and discussion is therefore vital. Media provide a mechanism for regular citizens to be heard and to therefore influence political agendas and campaign platforms, and sometimes garnering support and influencing fellow voters. This role as a forum for public debate is a complex one in post-conflict situations, as the line between debate and conflict needs to be carefully managed by professional media, which is not always present. The media serve as a forum for competing political actors to vie for power and to offer alternatives to the national project. This is both a strength and weakness. It is a strength because it means that the media, and the press in particular, can be a valuable space for reconciliation and dialogue between competing political perspectives (International Covenant on Civil and Political Rights, 1976).

A politician invited to a TV broadcast can talk about his family and his hopes for a better world for all of us. A talk show host is likely to ask softball questions to let the candidate appear relaxed and human. A call-in talk radio show provides an additional opportunity. A good campaign manager will do everything possible to make sure she can plant phone calls that are taken on the air. A host who takes call after call from people thrilled to just get the chance to talk to the candidate should suspect that his show has been taken over by the campaign. Campaigns know that finding the right political radio talk show can help win elections. It's typical for a candidate to criticize traditional media for not allowing "the whole story" to get out to the voters. Today, a candidate can bypass broadcast and print media to reach his potential voters through social media. A Facebook



page can show he has 20,000 fans, offer his entire news conference and most importantly, allow him a totally unfiltered way to speak.

In the United States, where private media is predominantly owned by mega corporations, access to media by parties and candidates is organized by way of paid advertising. Similarly in Finland, where commercial broadcasting developed rather earlier than in most of Europe, has a far freer approach to paid political advertising than most European countries. Unlike its neighbours, Finland provides no free airtime on public media and allows contestants to purchase unlimited private airtime.

Contrarily, countries such as Britain and Denmark, with a strong tradition of public ownership of the media, do not allow paid political advertising at all, and instead have a system of free direct access broadcasts on private broadcasters (Holtz-Bacha and Lee Kaid, 2006:10).

It is interesting to observe the journalist typology in order to understand the relationship between the media and politics, and it is also important to look at the different dynamics that can exist between a journalist and a politician.

The journalist considered a **hunter** tracks politicians down relentlessly and follows any route and sequence of his/her activity. These journalists never gives up until they have their prey. They will not believe the politician, even when the politician is telling the truth, which leads to lack of perspective and objectivity, their contribution to fostering the audience trust, being doubtful.

On the opposite side there are **the comfortable** journalists. Their view is why to work too hard when you can both have a profitable and easy life, because nobody will know, anyway. These journalists see their jobs only to provide the means to exist. They usually enjoy fine wine and good food and are available to participate to all parties they are invited to, and these kind of journalists see this as being fair, impartial and objective.

We do not know whether journalism is compatible with activism, but the journalist perceived as an **activist** is committed to a cause and will fight any politician who is against that cause while supporting any politician who backs the cause. This journalist can be limited and one-dimensional. He finds it hard to be objective because he realizes that offering another perspective may weaken the angle they wish to push. The activist journalist enjoys being seen as the martyr and often risks becoming the story rather than covering the story.

There is another type – **the buddy** – who becomes a good friend to the politician, often trying to induce that the politician is right regardless of any evidence to the contrary. This journalist will highlight that politician's activities doing him a favour and in these circumstances, the buddy journalist will be easily manipulated. Robert Karl Manoff, from the New York University, in his work, *The Media's Role in Preventing and Moderating Conflict*, arrived at the conclusion in the 1987 issue of *Center Magazine* that: "One of the major problems of today's journalism is that the press is allied with the state. The press is a handmaiden of power and American politics. It reports governmental conflict only when conflict exists within the state itself"<sup>3</sup>.

Being a **party member** journalist, means to spend a lot of time disregarding the political opinions of those with whom they dislike. They can be spotted by their

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<sup>3</sup> Manoff, Robert Karl, *The Media's Role in Preventing and Moderating Conflict*. This paper was prepared for the Virtual Diplomacy conference hosted by United States Institute of Peace in Washington, D.C., on April 1 and 2, 1997

enthusiasm for a story that other, less-compromised, journalists fail to see and they will defend that story choice against all logical reasoning.

We finally reach the most desirable category of those considered **the true journalists**. They are passionate about informing the public debate, free from party ties, have integrity and can't be bought, seek the truth, report objectively and fairly, and include multiple perspectives even those they dislike. Are prepared to investigate all they hold dear and precious and are realistic about human nature (Brewer, 2011).

Mass media role becomes more powerful mainly during elections when political parties are sensitive in terms of how the media shows their public appearances. It has a huge influence both on citizens and politics, since it shapes public opinion. The media should achieve the political role by "disseminating the full range of political opinions, enabling the public to make political choices and enter the national life."

In democratic countries, for instance, the media is a communication channel which ensures the exchange of opinions both in power and general public and governments and political parties don't put direct pressure on the media (depending on the country).

In liberal democratic countries it informs the public and acts as a watchdog of the government. Mass media must also make the political system more transparent, by helping people participate in political decisions, understanding the operations of government.

Jürgen Habermas currently ranks as one of the most influential philosophers in the world and defines the media as a space for public discourse which must guarantee universal access and rational debate in society. But, in practice, the free market rules and competition create restrictions for journalists, and commercial television channels are forced to respond to the interests of advertisers, as well as politicians.

The technological development changed the politics-media relationship. Since the rise of the internet in the '80-90s, the social media have involved many actors: regular citizens, nongovernmental organizations, activists, politicians, software providers, telecommunications firms, governments. In the new media environment various social networks and blogs started to play a significant role in communication and the society became an active player.

The dominant and powerful medium of political communication in our contemporary world is television. It creates, with the internet, new forms of political reality and the virtual world. Television tends to accentuate entertainment, that kind of television keeping viewers' attention. Television is the right place for the celebrity coverage and for political conflicts. Stories about backstage political maneuvering and control offer a kind of transparency.

Television's pervasive power led politicians and corporations to develop increasingly sophisticated image-management strategies. It has become common for senior politicians and government departments to employ press secretaries, often former journalists, to manage their relationship with the media. The news media plays a particularly important role during election campaigns. Voters need information about the parties' programmes, the candidates and possible coalition arrangements after an election. The media also provide critical analysis of the policies and past performance of parties and candidates. In the 1950s and 1960s many print journalists were required to measure with a ruler the amount of space dedicated to politicians' statements, ensuring each party was given equal space. The statutory requirement that the media give balanced coverage of political issues during an election campaign continues to be carefully scrutinized (McMillan, Kate, 2012: 4).

The internet, another important medium for politicians, has enhanced the effects of television by shortening the news of reporting, delivering inexpensive information and making possible new journalistic sources that compete with television coverage. However, it can worsen television's tendency to emphasize celebrity and gossip (Chobanian, 2017).

Within the broad framework of co-operation, conflict remains central and routine. Indeed, two features of the relationship ensure that conflict is endemic. The first expresses journalists' and politicians' divergent perceptions of the fundamental purposes of political communication. For journalists, the relationship provides opportunities to educate, enlighten and inform readers and viewers about persuade voters to their point of view (Blumler and Gurevitch, 1985: 485).

A second source of conflict is a consequence of the relationship being governed and regulated by mutual recognition of a set of agreed rules and conceptions which trigger confrontation if either party breaks those rules.

Consequently, a journalist who publishes an embargoed story makes public use of an off-the-record statement or identifies a source, paces the relationship at risk. Similarly, if a politician leaks a major story to another journalist, disavows a statement made previously to a journalist or refuses a journalist an interview, the relationship begins to break down (Blumler and Gurevitch, 1985: 472).

The process of mutual adaptation is driven by a strategic complementarity of interests. The media performs invaluable functions for politicians and their sources. Media coverage, for example, may help politician create and maintain a high public profile, what Mancini dubs politicians' quest for fame (Mancini, 1993: 37). Media reporting may also prove vital to politicians' efforts to promote public awareness and to support for particular policy initiatives (Franklin, 1999: 22)

Attitudes of political elites toward journalists' professional objectives were a significant predictor for their perceptions of media influence. Moreover, hierarchical regression models demonstrated that the relationship between attitudes toward politically driven journalism and perceptions of media influencing politicians' careers was moderated by national context. There are explanatory factors for politicians' and journalists' perceptions of two dimensions of media influence on the political process: their influence on the political agenda and on careers of political leaders (Maurer, 2011:28).

The relationship between political power and control over media frames runs through several paths. The first has to do with the distinction between front door coverage, alluded to earlier. Antagonists with political power are much more likely to gain access to the news media through the front gate as legitimate players in the political process, rather than through the back gate reserved for social and political deviants. Those with political power are more likely to be treated with respect by the news media (Blumler and Gurevitch, 1986: 474).

The ability to control the political environment is another benefit that political power brings to those who want to promote their frames to the news media. The ability to initiate and control events allows one to prepare the story carefully in advance: the ability to regulate the flow of information allows one to take control of the story line, and the ability to generate consensus among elites assures that most frequent sources will all be telling the same story. The political process is a dynamic one and the flows of political control provide many opportunities for challengers to promote their frames to the news media.

Among the different journalistic beats, those journalists who cover politics are afforded a special status, who are said to work in the most sacred part of the profession. The relationship between the two sides has been compared to a 'tango dance' in which

journalists and politicians engage in a 'tug of war' (Gans, 1990: 442). There is a necessary interdependence underpinning the relationship between journalists and politicians (Blumler and Gurevitch, 1981). Journalists need stories while politicians, their sources, need exposure. Politicians can provide journalists with news while journalists, in turn, can provide politicians with access to the public. Yet, while the relationship between the two sides has been defined as mutually dependent, it is a working relationship still characterized by conflict and cooperation. Media and politics will always be in a close connection, even if both consider each other as adversaries. As the media is the most important source of political information for the wider public, politicians need it as a tool to get the exposure to win elections and gain as much power as possible. On the other hand, as a watchdog in politics, the media has the duty of criticizing decision-makers in society, but it will be possible only if the media and journalists remain independent.

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# THE INTERDEPENDENCE OF THE DECISION-MAKING LEVELS IN THE EU'S MULTILEVEL GOVERNANCE. CASE STUDY: THE NORTH-WESTERN PART OF ROMANIA

*Alina Carmen BRIHAN\**

**Abstract.** *The present paper focuses on the challenges that the EU's multilevel governance brings to the process of governance in the Member States: the political processes, the institutional structures or the content of policies. In this context, the way different national actors participate to / and influence the EU decision-making process is of high importance. Therefore, the general objective of the paper is the analysis of the EU's multilevel governance framework and of the national governance (Romanian), for the purpose of determining the degree in which, eight years after Romania's accession to the European Union (2007-2015), different actors (public, private, NGOs, citizens) from the North – West Region capitalize the rights, powers and mechanisms at their disposal, in accordance with the provisions of the Treaty of Lisbon, in order to influence the EU decision-making process, but also of how they self-position in the EU's multilevel governance structure. As a consequence, the applied research of this paper is based on three case studies that regard, at the same time, three target-groups: the Romanian MEPs, the MPs from the North – West Region (comprising the following counties: Bihor, Bistrita-Nasaud, Cluj, Maramures, Salaj and Satu-Mare) and the county councilors from the North – West Region. For each of these three target-groups, the research objectives were, mainly, their role in influencing the European decision-making process and their positioning in the EU's multilevel governance.*

**Keywords:** *European Union, multilevel governance, decision-making process, influence, participation*

## **Introduction**

The EU's multilevel governance represents a challenge for the process of governance in the Member States, whether we refer to the political processes, the institutional structures or the content of policies. But, besides these internal transformations that the integration in the EU brings to the Member States, and still correlated to them, the way different national actors participate to / and influence the EU decision-making process represents an aspect that needs constant evaluation and streamline.

The presence of different decision-making levels (European, national, regional and local) make that the internal actors (political institutions, civil society, business environment) from different levels (national, regional and local), but also the citizens, to confront with challenges regarding the efficient exercise of their competences and roles in a *sui generis* political system. As a consequence, ten years after Romania's integration in the EU, we consider that the way our country is exercising its role and place in the EU

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multilevel governance and, implicitly, in the EU's decision-making process, remains a topic that needs constant evaluation – through the identification of the strengths, weaknesses, opportunities and threats regarding the exercise of its quality as an EU member state.

Therefore, Romania's accession to the EU, on January 1, 2007, has determined important transformations and it brought challenges regarding both the national decision-making process and Romania's place and role in influencing the EU decision-making process. On the other side, the national process of governance is undergoing an unprecedented transformation in our history, characterized by its evolution towards a process of national governance in the context of the European multilevel governance.

In approaching the present paper, the research targeted two conceptual levels: the relation between the concept of "government" and "governance"; and the concept of "multilevel governance". From the point of view of the latter concept, the examination of the European governance is also realized through the analysis of the European decision-making process – with regard to the place and role, in this process, of the actors from the European, national and sub-national levels.

### ***Theoretical Framework: the Dimensions and Interdependences of the EU's Multilevel Governance***

Regarding the relationship between "government" and "governance", the specialty literature signaled a lack of consensus about the nature of this relationship (Rosenau & Czempiel, 1992; Rhodes, 1996; Rhodes, 1997; Rosenau, 1997; Stoker, 1998; Chhotray & Stoker, 2009; Kjaer, 2010). Thus, while the "government" is associated with the Government, the "governance" has emerged as a concept designed to capture a new dynamic of the government (Lange, Driessen, Sauer, Bornemann & Burger, 2013: 405; Bellamy & Castiglione, 2011), defined by the existence of non-hierarchical interactions and, hence, more or less institutionalized, between public and / or private entities, aimed at achieving common objectives. Therefore, we agree with the view that if "government" is defined as what the governments do, "governance" is an attempt to explain, describe and analyze how they do it (Ion, 2013: 78).

The concept of "governance" has been also addressed in the light of some of the six meanings of the term "governance" - formulated by Rhodes in 1996 (Rhodes, 1996: 652-667), understandings that were also analyzed through further research: governance as the minimal state; governance understood as corporate governance; governance seen as New Public Management (developed in the '80s); governance as "good governance" (initially promoted by the World Bank); governance as a socio – cybernetic system; and governance in the form of self-organized inter-organizational networks.

The analysis of Lange and Driessen is also relevant to our research, because of the authors' focus on the three dimensions of "governance": the political dimension (*politics*) - which refers to the actors and the processes of interaction in a mode of governance; the state dimension (*polity*) - aimed at the institutional rules of the game that shape the interaction among the actors; and the policies dimension (*policies*) – comprising the content of governance, referring to the formulation and implementation of the public policies, of the goals and tools for achieving the results (Lange, Driessen, Sauer, Bornemann & Burger, 2013: 409).

In the literature review that addresses the relationship between "government" and "governance" are found, also, six forms of transnational governance identified by Rosenau, in 2004, three of them being approached in this paper, and as well as by the

subsequent research of different authors: the top - down governance; the bottom - up governance or the "governance without government"; or networked governance (Keohane, Macedo & Moravcsik, 2009; Bevir, 2011; Hazenberg, 2013).

From the perspective of the "new governance" theory, Simon Hix affirmed that the European Union is a *sui generis* political system, and the "governance" is a set of multilevel, non-hierarchical and regulatory institutions, and a hybrid mixture of state and non-state actors (Hix, 1998: 39). The characteristics of this "new governance" are, according to Hix, the following: the decision-making is not driven, solely, by the state, but involves all the activities of the social, political and administrative actors that guide, direct or control the society; the relationship between the state and the non-state actors is polycentric and non-hierarchical; and the key-function of the governance is to regulate the social and political risk, thus being a decision-making problem solving (Jachtenfuchs, Diez & Jung, 1997: 40).

All these features show that the "new governance" stands in contrast to classical processes centered on state, command and control, redistributive and ideological (Hix, 1998: 39). Given the fact that decision-making in the European Union is not, therefore, the same as in the state - nation state, it is asserted that there is not a central *agenda - setting* and no actor to coordinate it (Peters, 1994: 9-26), but that the process - from initiation to adoption and implementation - is complex and involves constant cooperation and deliberation among the different levels.

Since the '90s, different authors have affirmed the unique character of the EU's multilevel governance (Marks, Hooghe & Blank, 1996: 341-378); the fact that a governance beyond the state does not mean, necessarily, governance over the state; and that the EU is not a reproduction of the processes and policies that have formed, previously, the nation-state (Schmitter, 1996), but a network of national and supranational regulatory institutions, held together by shared values and common decision-making (Majone, 1996: 217). However, they stated that the European Union also possesses the classic characteristics of a political system: formal rules for joint decision-making, policy outcomes and the mobilization of citizens (Hix, 1998: 41-42).

Given that the EU governance requires some aspects of government, Jachtenfuchs stated that the EU multilevel governance includes the nation-states into a comprehensive system, while the national political, economic and legislative systems continue to exist (Jachtenfuchs, 1997: 40). However, the parallel existence of "governance" and "government" gave rise to conflicts between different logics of action; and yet, some authors consider that these conflicts can lead to the gradual strengthening of the logic of "governance" on "governing" in the EU (Benz & Papadopoulos, 2006: 15).

The multilevel character of the EU governance justifies the authors' interest on the analysis of the roles of national, supranational and sub-national actors (Ion, 2013: 107). Regarding the role of national actors, it is stated that these are the most significant actors in the European decision-making; the decision-making competences are shared by actors and include not only the state level, but they also lie beyond or beneath it, so that the final decisions are only rarely the lowest common denominator of the Member States; the perception of the national sovereignty is "diluted" by the interaction between the national and supranational institutions. Referring to the supranational actors, it is considered that they have a more significant role and an interdependence that ensure, in some cases, the exercise of an influence over the European decision-making process more than that of the nation-states'. Due to the reconsideration of the political levels, in terms of their interdependence and not in terms of their hierarchy, the activity of the sub-national actors

is recognized regardless of the analyzed decision-making level (national, supranational, transnational).

Potluka and Liddle declared that the multilevel governance also grants assistance regarding the understanding of the context in which the competences are transferred upwards – towards the supra-national organizations, sideways – to the quasi-autonomous actors, and down – to the sub-national authorities, but also with regard to the illustration of the relationships within and among the different levels of government and governance – through the partnership principle (Potluka & Liddle, 2014: 1436). In the speciality literature, the research challenge is represented by the identification of the extent to which the partnership principle improves the implementation of the public policies (Potluka & Liddle, 2014: 1438).

The definitions regarding the multilevel governance have in common that they define a governance model that emphasize not the structure, but the process and the results; also, the political authority faces a restructuring action, the relations among the institutions from different levels of government are considered as fluid, negotiated and contextually defined. Although the state remains the most important actor, the multilevel governance is based on the increasing recognition of several types of actors and of multiple decision-making levels, on the multiplication of the number and types of the decision-making networks through which the actors interact, on any changes caused by the traditional conceptions of the state - which seek to protect and, in certain cases, to strengthen the state autonomy or a new sense of democratic accountability. Therefore, the contemporary European state is faced with an increasing pressure to reinvent itself and to develop new strategies. Thus, the concept of multilevel governance refers, also, to the changing modes of governance and to the nation-state' place in a post – Westphalic world (Miroiu & Ungureanu, 2006: 19-20).

In order to understand the EU decision-making process, the formulation of the agenda (*agenda-setting*) is also important, although researches on the EU governance have paid little attention to it (Peters, 2001; Tallberg, 2003). The importance of the *agenda-setting* processes is given by the fact that, through them, it is determined which subjects are taken into the decision-making process. The *agenda-setting* is, therefore, a political process through which the political actors seek to bring issues on the agenda - if they want a policy change, or keep them out of the agenda – if they want to preserve the *status-quo* (Princen, 2007: 21). The *agenda-setting* models, from the national level, have institutional and political characteristics similar to the *agenda-setting* at the EU level.

In the literature on the EU governance, the "Europeanization" is another concept that enjoys a broad analysis. Despite the fact that researchers have not reached, yet, an agreement on the formulation of an elaborated theory on Europeanization, we can stop on a definition that captures the impact of policy and of the European public policies on the Member States, but also the redefinition, by the Member States, of their interests and behavior depending on the rules, the challenges and the logic of the EU membership (Auel, 2005: 305).

The process of the European policies' formulation is also considered to be a multilevel one (European, national, regional, local), a process that assumes, also, the interplay among different actors, public and private. The impact, however, at national level, of the European public policies depends on the institutional compatibility between the European policies' requirements and the national administrative arrangements. Knill was referring, in this regard, to the national administrative traditions, which he defines as general patterns of style and administrative structures that are, in institutional terms,

deeply rooted in the tradition of the state, in the legal system and in the political – administrative system (Knill, 2003: 42).

Unlike the Member States, the European Union doesn't have its own administrative policy so that, at European level, we can not talk about a similar organization to that of the national administrative policy (Knill, 2003: 36). Thus, the European public administration is considered to include all the authorities (administrative authorities of the Member States, the EU authorities - represented in the EU institutions, bodies, offices and agencies; the authorities of the national and European administration that are involved in the drafting of the European policies) (Iancu, 2010: 53-55), whose activity aims the organization and execution of the EU policies through the reception of the citizens' preferences, their placing on the public agenda, policy formulation, adoption, policy implementation and evaluation. The multilevel governance presupposes, therefore, new ways of involving the citizens in the decision-making process and in that of implementation, producing new frameworks for civic participation and regarding the relationship between the citizens and the administration, blurring, as a result, the boundaries between the state and civil society (Nousiainen & MäKinen, 2014: 3).

From the perspective of multilevel governance's challenges, different authors have stated that these are: democratization, accountability, representation and legitimacy (Catney, 2008: 1093). From the point of view of democratic legitimacy, the evolution of the EU from the Westphalic system to the European post-Westphalic system has raised some problems because the operations of the European institutions are legitimized through mechanisms that are appropriate for the nation-state, but not through mechanisms designed for this new complex structure, which led to the current democratic deficit (Albert, 2002: 307).

The simultaneous belonging of the European citizen to several groups or communities, and its subordination to the various decision-making levels, brings into question the determination of the degree of support, from the European public opinion, of the European Union, its institutions, policies and mechanisms (Sidjanski, 2010: 154). Therefore, at the European Union level it can be noticed a process of re-institutionalization of citizenship, at a different level of governance. The transnational political participation moves the component of active participation of the citizenship in a new territorial framework that transcends the borders of the nation-state, which makes the active participation to acquire, also, a multilevel character (Karolewski, 2010: 17). The European citizenship is considered, therefore, as transcending the nationality framework and as being constructed, in practice, by time, place, actors and institutions (Karolewski, 2010: 49). It is also found at different levels: regional, national, supranational; these levels are not only complementary, but also influence each other, they are constantly reviewed and develop continuously, at all levels of government.

As a consequence, the EU practices and regulations regarding the decision-making process, within a framework of multilevel governance, contribute to the development and the structuring of a post-national European civil society, that promotes active multilevel citizenship; more, the issue of citizenship and civil society are seen as crucial to the democratization of the EU, for its legitimacy and for the development of a European identity (Enjolras, 2008: 496).

***Case study: The North-Western Part of Romania in the EU's multilevel governance***

The option to research how the North – Western Part of Romania influences the EU decision-making process, in the context of the existence of eight development regions in Romania<sup>1</sup>, is based on two arguments: the strategic position that this region has in the national and regional context, being located at the intersection of the North - South and East – West axes and being a gateway not only from the EU, but also from outside the Union; under the preparedness of the institutional framework aimed to meet the integration criteria into the EU structures, the North – West Region of Romania (along with the other seven development regions) is about to take over, from the central government, new powers and financial resources, on which basis it will play a major role in the absorbition of the EU funds<sup>2</sup>. Also, if these steps are to be completed, they will bring clarification of the role of the Regional Development Agencies (ADRs), which will become development agencies and not only implementing agencies. The approach of the North – West Region of Romania is made taking into consideration the current context (the development regions in Romania are not administrative - territorial units, but administrative areas that provide a framework for the implementation and evaluation of the Romanian regional development policy) and the future (the obtainement, as envisaged, of the legal personality by the present development regions, will transform them into administrative - territorial units, a situation that might determine them to bring the regional theme on the political, public and media agendas, but also to redefine the objectives and actions of the actors, from different levels and sectors, regarding the influence of the decision-making process both at national and European levels, but also at regional level).

For this reason, based on the assumption that some political actors from the North – West Region do not act, in this moment, in a concerted manner, in terms of promoting the development goals of the region at national and European levels, as a consequence of the present legal status of the region, we sought to determine the degree to which this is done by two groups that possess direct legitimacy – at national level (MPs from the counties belonging to the North – West Region) and at local level (county councilors from the North – West Region; the county councils are the ones who, according to the law, decided that the area comprising the counties in question to constitute a development region<sup>3</sup>). Also, another target-group, which was included in this research, is that of the holders of direct legitimacy at European level - the Romanian deputies from the European Parliament, in relation to whom, in particular, we have analyzed the degree of activism of the local public authorities in Romania (county councils, local councils, municipalities), civil society organizations and citizens, as well as the collaboration of the Romanian deputies with the North - West Regional Development Agency. The research objectives were not focused, therefore, on analyzing the process of regionalization in Romania, but

<sup>1</sup> Law no. 151/1998 regarding the regional development in Romania established eight development regions, as territorial divisions; these regions are not administrative - territorial units, but they are administrative areas that provide a framework for implementation and evaluation of the regional development policy and for specific statistical data collection. The region discussed in the present paper is the North – West Region, comprising the counties: Bihor, Bistrița-Năsăud, Cluj, Maramureș, Sălaj and Satu-Mare.

<sup>2</sup> Regional Development Agency, *The development plan of the North – West Region 2014 – 2020*, April 2015.

<sup>3</sup> Law no. 151/1998 regarding the regional development in Romania, art. 4 (1).

on the way in which the legitimate political actors from this region (MPs, county councilors), the civil society, businesses and citizens are involved in the European decision-making process and how they self-position in the multilevel governance structure of the European Union.

The general objective of the paper is the analysis of the EU's multilevel governance framework and of the national governance (Romanian), for the purpose of determining the degree in which, eight years after Romania's accession to the European Union (2007-2015), different actors (public, private, NGOs, citizens) from the North – West Region capitalize the rights, powers and mechanisms at their disposal, in accordance with the provisions of the Treaty of Lisbon, in order to influence the EU decision-making process, but also of how they self-position in the EU's multilevel governance structure.

Based on the theoretical framework of the present paper, and consistent with its general and specific objectives, there have been formulated three hypotheses<sup>4</sup>:

- the structure of the EU's multilevel governance structure (*independent variable*) provides the framework for participation in / and influencing the EU decision-making process by actors from different levels (national, regional, local) and from different sectors (public, private, non-governmental) and citizens (*dependent variable*);
- the extent to which the actors from different levels (national, regional, local) and from different sectors (public, private, non-governmental), and citizens participate in / and influence the EU decision-making process depends on: the creation and the joint ownership of the mechanisms of information, participation, cooperation, preferences' transmission, responsiveness and efficient influence – as regards the decision-making process at different levels (European, national, regional, local), and that addresses the relations between actors from different levels (national, regional, local) and from different sectors (public, private, non-government) and citizens (*independent variable 1*); but also on the design of a pragmatic national strategy - aimed at identifying the national, and also European, interests of the country, as regards the effective exercise of membership in the European Union and the influencing of the EU decision-making process (through the national representatives in the European institutions and bodies) (*independent variable 2*);
- the failure to use the rights, powers and mechanisms that the actors - from different levels (national, regional, local) and from different sectors (public, private, non-governmental), and the citizens - have in the EU's multilevel governance structure (*independent variable*), determines a poor performance regarding the promotion of the national, and simultaneously, the European interests of the state, in the EU decision-making process (*dependent variable*).

From the point of view of the applied research, this paper contains the conclusions drawn on three case studies that regard, at the same time, three target-groups: the Romanian MEPs, the MPs from the North – West Region (comprising the following counties: Bihor, Bistrita-Nasaud, Cluj, Maramures, Salaj and Satu-Mare) and the county councilors from the North – West Region, selected for the reasons mentioned above. For each of these three target-groups, the research objectives were, mainly, their role in

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<sup>4</sup> The data and conclusions presented in this chapter are developed in the PhD thesis of Alina-Carmen Brihan – „The North-Western Part of Romania and the Process of Influencing the EU decision-making. Present and Perspective”, 2015.

influencing the European decision-making process and their positioning in the EU's multilevel governance.

The method of investigation was the sociological survey and the research tool – the semi-structured questionnaire (combining closed, semi-open and open questions). There have been developed three different semi-structured questionnaires, one for each target-group. For the Romanian MEPs, the applied questionnaire included 22 questions that aimed at identifying the most effective means of communication and collaboration between the Romanian deputies from the European Parliament and the different national stakeholders (citizens, civil society groups, local and central public authorities, etc.), with regard to the formulation and representation of national and, at the same time, European interests of Romania in the European Parliament, but also the process of influencing the EU decision-making. The questionnaire applied to the Romanian parliamentarians included 25 questions that aimed to identify the most efficient means of communication and collaboration between Romanian parliamentarians and different stakeholders from the local, regional, national and European levels (citizens, civil society groups, local and central public authorities, the Romanian MEPs, etc.), regarding the exercise of the role that the national parliaments play in the European decision-making, as a result of the Treaty of Lisbon. The questionnaire applied to the county councilors consisted of 18 questions aimed to identify the most efficient means of communication and cooperation among the county councilors and different stakeholders from the local, regional, national and European levels (citizens, civil society groups, local and central public authorities, the Romanian MEPs, etc.), in respect to the role that the local public authorities have in the EU decision-making process, as a result of the Treaty of Lisbon.

For completing the survey, the used technique was the self-completion questionnaire that was sent, by e-mail, to all the subjects from the target-groups: 32 MEPs (mandate 2014-2019), 63 MPs (mandate 2012-2016) and 196 county councilors (mandate 2012-2016). The response rate was the following: 15.62% MEPs, 17.46% MPs and 4.59% county councilors. In the case of the Romanian MEPs, we consider that the non-answers are not due to ignorance of the matters discussed in the questionnaire (aspect argued through the efficient functioning of the European Parliament - regarding the support offered, through its various structures, to the MEPs, in their activity), but to a busy agenda; to a large number of requests received from the citizens, from the civil society's groups or from entrepreneurs – aspect mentioned in the correspondence I had with them; or to the fear of breaches of confidentiality regarding the submitted answers. In the case of MPs, the non-answers may be the result of their busy agenda; the lack of responsiveness to such requests; their concern about the breaches of confidentiality on the submitted answers; or the possible difficulty regarding some items of the approached theme. As regards the county councilors, the non-answers could be interpreted in the light of the possible difficulties they had on some items of the approached theme; the lack of sufficient information on the European policy-making; the lack of interest on such research requests received from the citizens; fears concerning the breaches of confidentiality with regard to the submitted answers; difficulties in contacting them – as some counties don't have, on their sites, the email addresses of the councilors, but also the refusal of the civil servants from the respective county councils to communicate these addresses, the communication with the councilors being made through them.

At the beginning of the present paper we have mentioned that the EU's multilevel governance represents a challenge for the governance process in the Member States, whether we refer to the political processes, the institutional structures or the content of the



policies. Beyond these internal changes that the EU integration brings into the Member States, but closely related to them, the way in which the various national actors participate in / and influence the European decision-making process is an issue that requires constant assessment and efficiency.

Accordingly, we have formulated – as the general objective of this research – the analysis of the framework of the EU's multilevel governance and of the national governance (Romanian), for the purpose of determining the degree in which, eight years after Romania's accession to the European Union, the different actors (public, private, NGOs, citizens) from the North – West Region capitalize their rights, powers and mechanisms at their disposal, in accordance with the provisions of the Treaty of Lisbon, in order to influence the EU decision-making process, but also the way in which they self-position in the EU's multilevel governance structure.

The review of the specialty literature and of the primary sources (legislative and non-legislative from the European level) confirmed the first hypothesis of the paper, namely that the structure of the EU's multilevel governance provides the framework for participation in / and influencing the European decision-making process by the actors from different levels (national, regional, local) and from different sectors (public, private, non-governmental) and citizens. The same types of sources (primary and secondary), but from the national level, confirmed also that in Romania there is the legislative framework favorable to the participation in / and influence of the European decision-making process, both directly and indirectly.

The testing of the two hypotheses was performed, in the paper, through linking the theoretical framework of the research with the data resulted from practice. According to the second hypothesis, the degree to which the actors from different levels (national, regional, local) and from different sectors (public, private, non-governmental) and the citizens participate in / and influence the European decision-making process (*the dependent variable*) depends on: the creation and common ownership of the mechanisms of information, participation, cooperation, preferences' transmission, responsiveness and efficient influence - as regards the decision-making process at different levels (European, national, regional, local), and that addresses the relations between actors from different levels (national, regional, local) and from different sectors (public, private, non-government) and citizens (*independent variable 1*); and the design of a pragmatic national strategy - aimed at identifying the national, and also European, interests of the country, as regards the effective exercise of membership in the European Union and the influencing of the EU decision-making process (through the national representatives in the European institutions and bodies) (*independent variable 2*);

The linking of the theoretical framework to the analysis of the resulted data from the three semi-structured questionnaires has led to several conclusions, about the present moment, on six types of relationships between the local, regional, national and European levels. The approach of the relationships, among these decision-making levels, we realize by focusing on the actors at these levels, which allows us to outline a perspective on how they interact in this moment, but also on the measures that they have identified in order to improve the relationships among them.

The first type of relationship, that between the *local* (public authorities from the North – West Region) and the *European* levels reveals several main directions, drawn from the data interpretation, on the local level's involvement in influencing the European decision-making process. Thus, we can notice the need to strengthen the cooperation between the local public administration authorities (county councils, local councils, town

halls) and the Romanian MEPs, as regards the representation of the national, and also European, interests of Romania in the European Parliament; the increasing of the number of positions' requests, from the local representative public authorities, by the Romanian MEPs, on the European issues with a local impact; strengthening the role of the MEPs' offices for involving the citizens, civil society's organisations and the business environment in influencing the European decision-making process; or devising a specific procedure regarding the involvement of local and county authorities in the European decision-making process. Also, at local level, we have identified the need of: formulating a communications strategy of the local public authorities (county councils, local councils) with the citizens, on the European legislative proposals with a local impact; creating a mechanism for monitoring the European legislative proposals, with a local impact (the subsidiarity control), and signaling the interest in a particular initiative, to the Romanian MEPs; involving the citizens, civil society's organisations and businesses, to formulate suggestions and recommendations on European issues, at the representative local authorities' level (county council, local council). Contacting and developing of a relation between the representative local authorities and Romanian representatives in the Committee of Regions, regarding the European legislative proposals with a local impact; increasing the involvement of the county councils in the Committee of Regions' (CoR) consultations, in various stages of the legislative process; a communication strategy of the CoR's opinions and achievements, at the local and county levels; or lobbying the European institutions, as it is important for the representation of the local interests and, at the same time, European, of the respective administrative structures, in the European Union. Another issue regards the organization of experience exchanges and of training programs for the local and regional elected representatives from the EU Member States, concerning the identification of the European dimensions in the local or regional decisions; experience exchanges between the local and regional elected representatives from the EU Member States, on the best practices regarding the citizens' participation in the European decision-making process; organizing special meetings, at local and county levels, devoted to the European integration and the European policies; or strengthening the partnership between the local and county authorities and the civil society / private sector, on the European legislative initiatives.

A second category of relationships - between the *local* (representative public authorities from the North – West Region) and the *national* levels - targets several measures whose utility is to develop a mechanism of indirect influence, through the representative national authorities, of the European decision-making process. In this process, an important role have the Romanian MPs and the Romanian Parliament, and it is translated into actions such as: the strengthening of the relation between the local public authorities (county councils, local councils, town halls) and the parliamentarians from their county, in order to better define and promote the local interests with regard to the European legislative proposals with a local impact; the correlation between the MPs' agenda and the political agenda of local public authorities from their district (county councils, local councils, municipalities), but also with the public agenda (civil society's organizations and the citizens), but also with the local mass – media's agenda; increasing the role of the Romanian Parliament in terms of informing the citizens about the means of exercising the active citizenship at local level; strengthening the role of the parliamentary offices as regards the involvement of the citizens, civil society and businesses in influencing the national decision-making process; the growing of the positions's requests, from the County Council, by the county's MPs, with regard to the European issues, with a

local impact; the increase of the number of requests of reports, information, documents, etc., from the Commission of European Affairs from the Romanian Parliament, for the debates within the Commission; or the design of an effective mechanism for consultation between the European Affairs Committee (the Romanian Parliament) and the local and regional authorities, on the European legislative proposals impacting these levels. Also, regarding the county councils (from the North – West Region), it can be noticed the need to formulate a communication strategy with the citizens, on the EU's legislative proposals with a local impact, within the National Union of the County Councils from Romania (UNCJR); strengthening the relationship between the local public authorities (county councils, local councils, town halls) and UNCJR, regarding the European legislative proposals with a local impact; or more efficient cooperation between the County Council and the other county councils belonging to UNCJR, in order to better define and promote the local interests, on the European legislative proposals with a local impact.

Thirdly, regarding the nature of the relationship between the *local* and *regional* levels (from the North – West Region), this is influenced by the fact that, at the moment, the development regions in Romania are not administrative - territorial units, but only administrative zones which provide a framework for the implementation and evaluation of the Romanian regional development policy. However, given that there is the prospect of acquiring, by the development regions, of the statute of administrative - territorial units, we consider that is needed to be developed a more efficient cooperation, at county level, between the County Council and the local councils, and between county councils from the North – West Region, in order to better define and promote the local interests with regard to the European legislative proposals, with a local impact.

Closely related to this relationship are the fourth relationship - between the *regional* (North – West Region) and *national* levels, and the fifth - between the *regional* (North – West Region) and the *European* levels. Regarding the relationship between the *regional* (North – West Region) and *national* levels, we notice the importance of: developing a cooperation among the parliamentarians from the counties belonging to the North – West Region and the North - West Regional Development Agency, regarding the representation of the citizens' interests from their constituency; correlating the objectives from the MPs' agenda from the counties belonging to the North – West Region with those from the agenda of the North - West Regional Development Agency; developing a common strategic approach by the parliamentarians from the North – West Region, in order to promote the development goals of the region, at the national level; developing a common strategic approach by the parliamentarians from the North – West Region (regardless of their political affiliation), regarding the promotion of the local, regional, national and, at the same time, European interests of Romania, in the Romanian Parliament; or increasing the role of the Romanian Parliament as regards the process of informing the citizens about the means of exercising the active citizenship at regional level.

The fifth type of relationship – that between the *regional* (North – West Region) and the *European* levels – action regards the need of: strengthening the collaboration between the Romanian MEPs and the Regional Development Agencies (and, particularly, with the North - West Regional Development Agency); increasing the activism of the local public authorities (county councils, local councils, municipalities) from the North – West Region, regarding the contacting of the Romanian MEPs on the topics from the agenda of the committees they are part of and which have an important local or regional level impact; maintaining a permanent dialogue between the Romanian MEPs and the Romanian Regional Development Agencies; informing the Regional Development

Agencies information on the European legislative initiatives, sensitive for Romania, which have a local or regional impact; achieving an early coordination of a dossier of regional interest; supporting the Regional Development Agencies in their relation with the European Commission; or increasing activism of the civil society' organizations from the development regions of Romania, regarding the contacting of the Romanian MEPs.

The sixth type of relationship and, also, last relationship analyzed – namely, the one between the *national* and *European* levels - identifies several directions to be followed: the use, by the MEPs, of the specific instruments of their parliamentary activity, for the promotion of the national and, in the same time, European interests of Romania; the strengthening of cooperation between the Romanian MEPs and the Government of Romania (regarding Romania's position on the different folders; organizing meetings with the representatives of ministries) and with the Romanian Parliament (organizing meetings with members of the specialized committees); strengthening the collaboration between the Romanian MPs and the Romanian MEPs; achieving a common strategic approach, by the parliamentarians from the North – West Region in order to promote the development goals of the region, at national and European levels; developing an alignment of the objectives from the agenda of Romanian MEPs with those from the Romanian public and media agendas, and not only with that of the political party they represent, or to that of the political group; the correlation of the MPs' agenda with the political agenda of the European Union; strengthening the role of the Romanian Parliament in order to influence the European decision-making; a more efficient use of the various available mechanisms that contribute to the involvement of the Romanian Parliament in the EU decision-making process (and targeting either the work of the Romanian Parliament, on the European affairs domain; the information sharing with the European Parliament and the Romanian MEPs; or the collaboration with other Member States, with the Romanian civil society or with the Romanian citizens); the increased role of the Romanian Parliament in informing the citizens about the means of exercising the active citizenship at national and European levels; strengthening collaboration between the Romanian MEPs and the Romanian citizens, civil society and business environment; the establishment of structures for the representation of the main Romanian economic sectors, in Brussels, but also of the Romanian NGOs, depending on their field of activity; the informing of the civil society, by the Romanian MEPs, on the impact of certain European decisions on the Romanian civil society; or the increase of the political participation of the Romanian citizens to the influence of the EU decision-making, by using such means as the participation in elections - to elect the representatives in the European Parliament, participation in public consultations organized by the EU institutions, contacting the Romanian MEPs, participation in public debates at the European level, or the European Citizens' Initiative.

The interpretation of the data from the three questionnaires illustrated that, in this moment, the second hypothesis is validated only partially, in the Romanian context, in general, and in the North - West of Romania, in particular. This conclusion is supported by the fact that although, from a legislative point of view, there is a framework for the participation in / and influence of the European decision-making, both directly and indirectly, basically we perceive an absence of the efficient mechanisms of information, participation, collaboration, preferences' transmission, responsiveness and efficient influence – regarding the decision-making process at different levels (European, national, regional, local), and addressing the relations among the actors from various levels (national, regional, local) and from different sectors (public, private, non-governmental) and the citizens. Also, as shown in the program documents of Romania, and in the

responses transmitted by this paper's target-groups - the absence of a pragmatic national strategy - aimed to identify the national and, in the same time, European interests of the country, regarding the effective exercise of the membership quality in the European Union, but also the influence of the European decision-making process (through the national representatives in the European institutions and bodies) affects the degree of participation in / and influencing the European decision-making process, of the various actors from different levels.

This conclusion indicates, thus, the danger of validation of the third hypothesis, if Romania does not undertake, with responsibility and within the shortest time, in overcoming the existing problems regarding the participation in / and influencing the European decision-making process. Consequently, the absence of fructification of the rights, competences and mechanisms that the actors from different levels (national, regional, local) and from different sectors (public, private, non-governmental), and the citizens have in the EU's multilevel governance (*independent variable*) causes a poor performance regarding the promotion of the national, and also European, interests of the state in the EU decision-making process (*dependent variable*).

Therefore, according to the data collected in our research, we can draw some conclusions regarding the participation in / and influence of the European decision-making process by the various actors from the North – West Region, but also in the broader context of the Romanian national and European governance: the level of knowledge of the organization and functioning of the European Union influences the degree to which the various domestic actors participate in and / influence the European decision-making process; the internal actors (from various levels and different sectors) do not fructify, optimally, the opportunities for participation in / and influence of the European decision-making process; the presence of an effective national coordination, regarding the European affairs, influences the degree of participation in / and influence of the European decision-making process; the absence of efficient national mechanisms for cooperation among different actors, from different levels, affects the degree of participation in / and influence of the European decision-making process; and the absence of legal personality, by the North – West Region, affects the existence of a strategic coordinated action, among the various actors, concerning the promotion of the regional and, at the same time, European interests of the region.

From the interpretation of the data we have also remarked that the degree of awareness and the use of the principles of the European governance, as well as of the mechanisms and instruments of the European decision-making process and of the EU's multilevel governance, encounter a decline – from the European level, to the national one and to the local level. Also, in the context of the changed conditions, in the future, of the administrative status of the Romanian development regions, it becomes essential the early preparation of this process, also on the issues mentioned above.

Based on these observations, we consider that, in the short term, Romania needs a pragmatic national strategy - aimed to identify the national and, in the same time, European interests of the country, regarding the efficient exercise of the membership in the European Union, but also the influence of the European decision-making process (through the national representatives in the European institutions and bodies); the designing of an efficient and responsible coordination mechanism, at national level, in the European affairs domain; the creation of a mechanism of information, participation, collaboration, preferences' transmission, responsiveness and efficient influence – as regards the decision-making process at different levels (European, national, regional, local), and that addresses the

relations among the actors from different (national, regional, local) and different sectors (public, private, non-governmental) and citizens; and the preparation of Romania's the mandate of the EU Presidency in 2019, through a process of collaboration, both internally and at European level (together with the European institutions and the other two countries - Finland and Croatia – with whom Romania forms the *trio*).

### ***Conclusion***

Therefore, in this paper, our approach was to review the EU's multilevel governance structure in terms of three dimensions: political processes; institutional structures; and the content of policies. The EU governance has been addressed both top-down and bottom-up, through the role, the place and the political agenda of various actors from different levels (Romanian MEPs, MPs from the North – West Region, county councilors from the North – West Region), but closely related to their perception on other public, private and NGO actors from different levels (European, national, regional, local) and the citizens. I have also focused on the *input* legitimacy (defined as the effective participation of citizens in the decision-making process) and *output* legitimacy (defined as the quality of the policy outcomes) of both the national and European governance, given that both dimensions of legitimacy must be met in order to legitimize a national political system or a *sui generis* one. Thus, we have concentrated on the internal functioning of two mentioned types of political systems, on their transparency, openness, effectiveness and efficiency and, in particular, on the performance of the national political system (Romanian) concerning the *output*, given that it is, simultaneously, part of a unique supranational system. We believe, however, that the opening of the system to the civic participation and the rights of individuals is not effective without the presence of sufficient knowledge, skills, attitudes and values necessary for the exercise of these rights. The multilevel governance also involves new ways of collaboration, of citizens' involvement and civic participation. In this regard, we considered the citizen through the prism of its simultaneous belonging to multiple groups or communities, but also of its subordination to different decision-making levels (European, national, regional, local). Thus, the European governance is about the distribution of power between different levels of government. At the same time, we took into account the fact that different actors are included in the decision-making process, from the formulation stage to the implementation stage, both at national and European levels. Furthermore, we noticed the presence of conflicting logics of action (between the national and European levels), but we share the view that these conflicts will not have a destructive effect, as they can lead to the gradual strengthening of the logic of governance regarding the EU governance. And that, given the fact that the European governance is a coordinated action among the EU, the Member States and the regional and local authorities, and it is based on partnership and aims at the development and application of the European public policies. The democratic quality of the European governance and of the EU decision-making is obtained through actors (participation), actions (effectiveness) and achievements (namely a collaborative governance, promoting responsibility through openness, transparency, consultation, communication, etc. and produces results of public policies). Last, but not least, the responsibility for the results of the governance is divided between the state and other actors (private, NGOs, citizens), and their legitimacy to exercise the functions of governance will depend, ultimately, of the results that will be able to obtain.

In the long term, we believe the topic remains a very important one, in context of: the medium and long term strategies of the EU (horizon 2020, 2030); the transformations

that the multilevel governance, multilevel citizenship and multilevel participation will experience in the coming years; the pressure, also in the future, on the nation - state to reinvent itself and to develop new strategies in the context of an ever more complex and deeper Europe; the gradual strengthening of the EU membership, by the latest integrated countries (Bulgaria, Romania, Croatia), but also through the accession of new countries to the European Union.

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## THE ICTS' IMPACT ON RELATIONSHIP BETWEEN CITIZENS AND PUBLIC INSTITUTIONS: SOME EVIDENCE FROM ROMANIA

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**Abstract.** *Internet and digital technologies have become part of our life, essential for a lot of daily activities and new powerful means of communication as well, able to invigorate the traditional forms of interaction between citizens and public institutions. The paper analyzes their spreading across the European Union, and particularly in Romania, and their potentialities to promote transparency and accountability within the public institutions, to fight against corruption and to expand citizens' social mobilization. Even if Romania has much to do to provide quality online public services, to increase the efficiency in public administration and to improve the communication between citizens and institutions, the examples and best practices mentioned in the paper highlight the potential of ICTs both as anti-corruption tools as well as participatory tools.*

**Keywords:** *ICTs, online communication, institutional transparency, anticorruption tools, participatory tools.*

### 1. Digital revolution and its dimensions in the European Union

The Information and Communication Technologies (ICTs) transformed our world in a “global village”. The Internet and digital technologies (e.g. portable devices, like smartphones or tablet computers) became so ingrained in our day-to-day life that it is seen as natural. They became part of our work, leisure and social life, essential for a lot of our daily activities, from shopping online and reservation of plane tickets, to inscription to school and payment of taxes. More than that, with the development of Web 2.0, which is based on a dynamic paradigm that allows users not just to receive information, but also easily to interact, the possibilities for individuals to communicate and to share every kind of content and data have spectacularly increased (Orofino, 2015). Interaction has become a “two way process” which, if we refer to the political field, could be more able to influence political agenda and the behavior of both political representatives and citizens.

Recognizing its significant role, A United Nations Report from 2011 declared the access to internet as one of the fundamental rights of human beings. Disconnecting people from the internet constitutes a human rights violation. The Internet is revolutionary, said the Report, unlike other communication medium such as radio, television or printed publications, which are based on “the one-way transmission of information”, the Internet is an “interactive medium”, which makes people “no longer passive recipients, but also active publishers of information”. Thus, the Internet can be a tool of empowerment, “one of the most powerful instruments of the 21<sup>st</sup> century for increasing transparency in the

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conduct of the powerful, access to information, and for facilitating active citizen participation in building democratic societies”. (U.N., 2011, p. 4)

At the European Union’s level, promoting the development and dissemination of the new ICTs is a priority, given their potential to foster economic growth, innovation and progress. As one of the flagship initiatives of the Europe 2020 Strategy, the Digital Agenda for Europe seeks to optimize the benefits of digital technologies. In order to have a dimension of their spreading across the EU, the data below (Table 1) show the percentages of digital inclusion, digitalization of single market and public services in all EU’s countries in 2014 and the target for the next year.

**Table 1:** Digital single market, inclusion and public services

	<b>EU average (2014)</b>	<b>Target</b>
<b>Broadband</b>		
Basic broadband coverage for all	100 %	100 % (2015)
<b>Digital single market</b>		
Population buying online	47 %	50 % (2015)
Cross-border e-commerce	12 %	20 % (2015)
Small to medium-sized enterprises (SMEs) selling online	14 %	33 % (2015)
<b>Digital inclusion</b>		
Regular Internet use	72 %	75 % (2015)
Regular Internet use by disadvantaged people	57 %	60 % (2015)
Population never having used the Internet	20 %	15 % (2015)
<b>Public services</b>		
Citizens interacting online with public authorities	42 %	50 % (2015)
Citizens returning filled-in forms to public authorities electronically	21 %	25 % (2015)

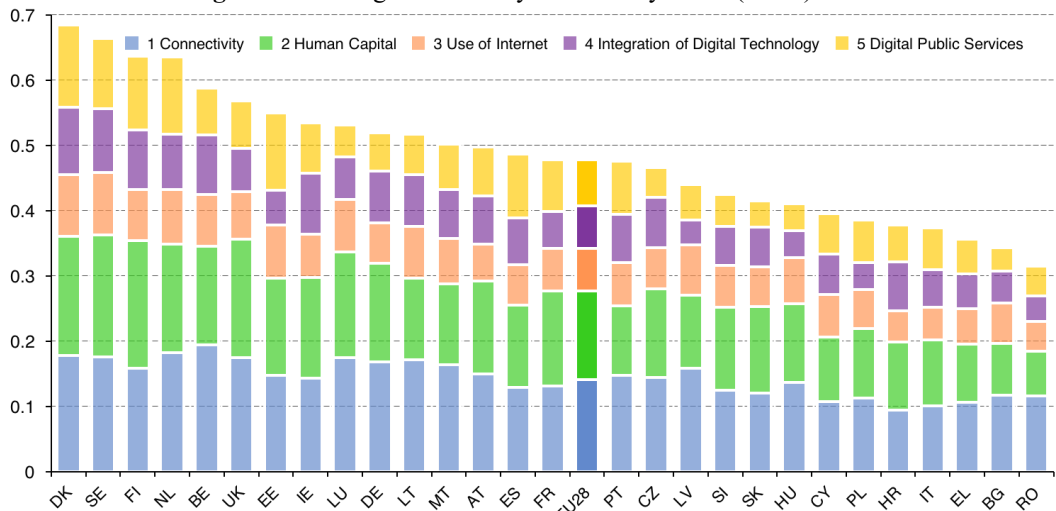
*Source:* Digital Agenda for Europe, 2014

We find that 72% of European citizens regularly use the Internet, while 20% of them have never used it. People living with disabilities are still facing difficulties in enjoying the benefits of the new electronic services (57% of them regularly use the Internet, at the EU’s average). As concerns the digital single market (understood as one in which free movements of goods, services and capital is ensured and which is meant to tearing down regulatory walls and recovering from 28 national markets to a single one), data show that 47% of Europeans are buying online, but the cross-border e-commerce remains insufficiently developed (only 12%). The targets are ambitious and aim to almost double the volume of e-commerce by 2015. ICTs are about to become the heart of government processes and are widely used in interaction between citizens and public authorities: 42% of Europeans have interacted online with public authorities in 2014.

A deeper analysis of the EU’s evolution towards a digital society highlights disparities between the Member States regarding digital developments. The Digital Economy and Society Index (DESI) for 2015 tracks the evolution of the EU Member States in digital performance, calculated as weighted average of five main indicators (see Figure 1): a) connectivity (meaning access to fast broadband-enabled services); b) human capital (the skills needed to take advantage of the possibilities offered by a digital society, from basic user skills to advanced skills of workforce that enhance productivity and economic growth); c) use of internet (refers to the variety of activities performed online, from consumption of videos, music, games to communication on social networks or online shopping and banking); d) integration of digital technologies (measures the digitization of

business and their exploitation on the online sales channels); and e) digital public services (measures the digitization of public services and focuses in particular on e-government and e-health, in order to deliver better services for citizens).

**Figure 1: The Digital Economy and Society Index (DESI) 2015**



**Source:** <https://ec.europa.eu/digital-agenda/en/digital-economy-and-society-index-desi>

We see that digital developments are uneven across the EU and Romania ranks last in this index, with an overall score of 0.32, less than half the score of the best performing country (Denmark- 0.68) and far below EU average (0.48). Denmark, Sweden, the Netherlands and Finland are the highest performing countries, not only ahead in the EU, but also as world leaders in digital. According to Digital Economy and Society Index data (DESI, 2015), Romania has the lowest percentage of regular Internet users in the EU (48%) and 39% of Romanians have never used the Internet (the EU average is 18%). Romanian Internet users are keen to engage in reading news online (70% of them), in communication via voice or video calls (46%) or through social networks (67%), but they are very reluctant to engage in any type of online transaction: only 7,7% of them use the online banking and 17% shop online, the lowest of all EU countries. Very few small and medium-sized enterprises in Romania sell online (7,3%) and those who do sell online make a very small share of their turnover from those sale (4,3%). At the same time, Romania's offer for online public services is the least sophisticated in the EU: only 5,8% of the internet users have interacted with public authorities over the internet in 2014, sending filled forms or completing the documents available online.

This kind of services needs to be improved, being that modern public services offered online in an efficient manner are a vehicle for reduction of public administration expenditure and for gaining in efficiency for both administration and citizens. We can see that Romania needs to do more progress on these chapters and, as the paper seeks to emphasize further, ICTs are useful tools in reducing corruption, by increasing transparency of public institutions activities, as well as in stimulating the involvement of citizens in community, in order to influence decisions that affect their lives.

## 2. ICTs as anticorruption tools

The citizens' access to public information and the transparency in the public institutions' activity, especially in the way the public resources are spent, are essential to open administration towards citizens, to make it more accountable and responsive to the needs of society and to fight corruption. The most common definition of corruption (World Bank, Transparency International) is the misuse or the abuse of public office for private interests, resulting in a biased allocation of public resources. To control corruption means to have the capacity, as a society, to restrict authorities from distributing public goods and resources in their own interests, in other words, to have the capacity "to constrain corrupt behavior in order to enforce the norm of individual integrity in public service and politics and to uphold a state which is free from the capture of particular interests and thus able to promote social welfare" (Mungiu-Pippidi, 2013, p. 5). The transparency in the activity of public officials, civil servants, board members, managers is thus the surest way of guarding against corruption and to increase the trust of citizens in public institutions.

Unfortunately, enacting legislation meant to make more transparent the activity of public institution and to bring the decision-making process closer to citizens took more than a decade after the fall of communist regime in Romania and a culture of transparency is even more difficult to create. The first and most important laws that created the framework to fortify the control of civil society over the activity of public institutions were the Law of free access to information of public interest, adopted in 2001 and the Law regarding the decisional transparency in public administration, adopted in 2003, both of them considered at that time as great victories of the civil society organizations in relationship with public authorities. These laws regulate the possibility and the limits of citizens' involvement in the activity of public administration institutions, making practically impossible to ignore them and increase the transparency of these institutions that compel them to publish information relating to or resulting from their activities.

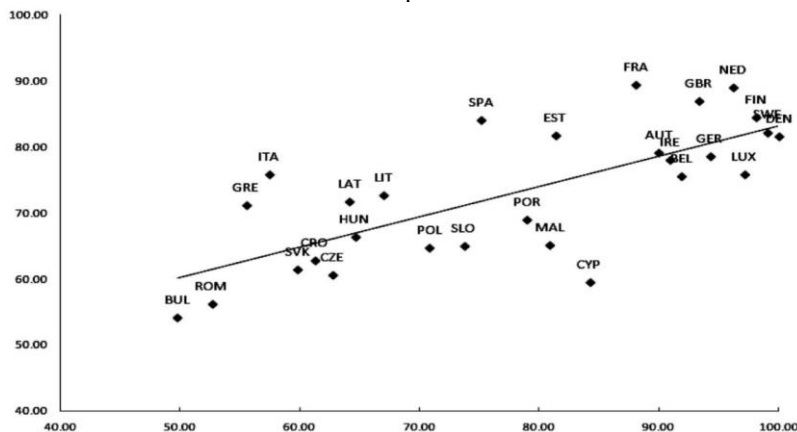
But their existence does not automatically bring with it a culture of participation and transparency. Many researches (Matiuta *et al.*, 2008, Bucheru, 2014) indicate citizens' apathy, distrust, lack of interest and ignorance of leverages by which they can influence decision-making and access to information concerning the activity of public institutions. Often, even if they know their rights, they invoke the lack of time, the lack of skills to use these rights and especially the futility of a such approach. Many citizens believe that important decisions can not be influenced without knowing someone "within the system", that informal contacts are preferable to have success in an issue or to make your rights respected. On the other side, the representatives of public authorities consider that they respect the legal framework which allows citizens' involvement, but their recommendations often lack of consistency and cannot be included in draft legislation and, frequently, citizens' participation is not active, but reactive, as a post-factum reactions to authorities' decisions.

The results of such research are confirmed by survey data, which show the acceptance by the general public to give money, or a gift or do a favor in return for something obtained from the public administration or public services. According to Special Eurobarometer 397, three-quarter of European citizens (76%) think that corruption is widespread in their own country (93% of Romanian citizens believe that) and almost as many (73%) agree that bribery and the use of connections is the easiest way in obtaining some public services in their country. A quarter of Europeans (26%) think that it is acceptable to do a favour in return for something that they want from the public

administration or public services, while more than half of them believe that bribery and the abuse of positions of power for personal gain is widespread among political parties (59%) and politicians at national, regional or local level (56%). Across the areas of public services, corruption is perceived to be more widespread among officials awarding public tenders (45%), those issuing building permits (43%), police/customs (36%), healthcare (33%), officials issuing business permits (33%), tax authorities (24%), tribunals (23%), public prosecution service (19%), social and welfare authorities (18%). There are clear differences between new and old EU Member States (NMS 12 vs. EU 15) regarding both attitudes and levels of exposure to corruption: respondents in the NMS 12 countries are more likely to say that someone had asked or expected them to pay a bribe for their services (15% vs. 2%; and 25% in Romania) and to agree that corruption is part of their business culture (European Commission, 2014b).

In this context, the ICTs have great potential to promote transparency, accountability and anti-corruption goals, to reduce bureaucracy and the costs for accessing and sharing government information, to strengthen relationships between citizens and institutions and to expand their social mobilization (Bertot *et al*, 2010). The more the public information and services are available online, the more citizens are encouraged to participate and the more corruption and clientelism decrease. The figure below (Figure 2) draws relationship between availability of online public services and control of corruption in the European Union's countries, indicating a strong correlation between low availability of online public services for citizens and low control of corruption (1 meaning the worst control and 100- the best control and the less corruption). As we can see, Romania and Bulgaria, the most corrupted countries in the European Union, are the less developed regarding transparency (from fiscal transparency, to transparency of assets for public officials and transparency of decision-making) and online delivery of key public services (such as income taxes, job search services, social security benefits, personal documents, registration of a new company, health-related services, enrolment in higher education, car registration, application for building permission, social contribution for employees, announcement of moving etc.). At the opposite site, the Nordic countries have both a very high level of corruption control and a high advancement in e-government.

**Figure 2:** Relationship between the availability of online public services for citizens and control of corruption



*Source:* <http://sar.org.ro/raport-sar-buna-guvernare>

One of the main ways by which ICTs could be useful tools for reducing corruption is the online availability of government's revenues and expenditure, of state budget allocations and government contracts. Unfortunately, Romania has a rich experience of wasting public money, even when one cannot reproach the authorities for the lack of transparency or lack of access to information. An illustrative example in this regard is the management of public funds for infrastructure. A project developed by NGO Romanian Academic Society about the public procurement in the construction sector reveals that, although large amounts of public funds were spent, public contracts were often awarded to companies based on corrupted practices or political connections, the focus being on redistributing public money and not achieving high quality construction works (SAR, 2015b). To prevent such practices, necessary improvements should be made to the electronic public procurement system, in order to have a functioning unitary database and more verification and selection filters. In other words, new online tools have the potential to reduce corrupt practices and to make more transparent the whole process of the budgetary allocation.

We should notice that an encouraging step in this regard could be a recently launched online platform, called *budgetary transparency* ([transparenta-bugetara.gov.ro](http://transparenta-bugetara.gov.ro)), meant to bring more transparency in public administration and in the way the public moneys are spent. It seeks to improve the management of budgetary resources by introducing verification tools and budgetary control automatically. The platform, which is under development, will provide information, in an aggregated manner, on how public funds are distributed on different budget lines, on how they are spent and which are the results. All public entities across the country, both at central and local levels of administration, will must have to upload information regarding their revenues and expenses that can be accessed by any interested person. As the government officials declared at its launch, the platform is expected to remove the risks of fraud or corruption and to track the implementation of public policies that require budgetary outlays (AGERPRES, 2016).

Another avenue for transparency, anti-corruption, openness and collaboration offered by ICTs is the use of social networking sites (e.g. Facebook) and platforms in interaction between public institutions and citizens. Social media gives users a platform to speak; it is collaborative and participatory by its nature. Social networks like Facebook began to be used by public institutions in Romania. Sometimes, communication thorough these networks replace the classic institutional dialogue, the president and the prime minister choosing to communicate through their personal Facebook accounts instead of communication through the press departments of presidential administration and government. But overall, the use of social media by public institutions in Romania is in an early stage. A pilot-study analyzing the communication through Facebook of county councils in Romania emphasizes that most county councils do not have an official account on this social network or, if they have, it is no longer active (no posts in the last six months). Those who have such account (the study stops on Cluj and Dolj county councils) send messages not adapted to this type of interaction. Communication paradigm remains overwhelmingly unidirectional: comments, even when present, are not part of a real dialogue and those responsible for content do not enter into conversation with commenters (Urs, 2015, p. 131). Therefore, the new technologies are not enough integrated as part of institutional communication and their potential for a real dialogue between public institutions and citizens remains to be proved, by establishing rules and procedures on how communication through these channels should be conducted.

In the same purposes, of making government more open, accountable and responsive to citizens and involving them in decision-making process, other applications of social media have been developed both by government and non-governmental organizations. We stopped at four of them, whose analysis led us to consider them examples of good practice.

### **3. Several best practices in using ICTs as participatory tools in Romania**

*Domnule Primar/ Dear Mr. Mayor* ([domnuleprimar.ro](http://domnuleprimar.ro)) is an interactive platform meant to ensure an efficient communication system between mayors and citizens. Through the website, citizens have the possibility to communicate directly to the mayor of their place of residence their personal or community interest problems, filling out an online form explaining concisely the complaint/ notification. The mayor will have to respond within maximum 30 days, according to Law 544/2001 regarding the free access to information of public interest. Both notification and mayor's response are published on the website in order to ensure transparency and rapid communication between citizens and mayors. The platform includes more than 78000 complaints coming in the last years from citizens living in more than 250 towns across the country, a top of the complaints by counties, by region, as well as a top of the most active mayors in this kind of interaction with citizens. It has a valuable dimension also by familiarizing citizens with legislation on their rights and civic responsibilities, by publishing various analyzes and studies on economic, social, administration, health or educational issues, as well as daily news from Romania's counties.

*Piata de spaga/ The bribery market* ([piatadespaga.ro](http://piatadespaga.ro)) is another interactive platform, developed by EPAS Association and Funky Citizens, NGOs whose assumed mission is to inspire and to educate citizens to act responsibly in the public space. The platform is an information tool that monitors the "right price" on market bribes, based on reports made by citizens across the country (whose privacy is ensured) regarding the bribe paid to certain public services, the amount and who asked for it. The project speaks about the experience of people who have paid (or not), where, when, for what or how much was paid the most, how much was paid the least and how satisfied were those who paid before you, convinced that the more we use this information tool, the more we have the chance to reduce prices bribes. We can find out there are places where problems are solved without bribe and we must be aware that corruption affects each of us primarily because we participate, we do not reject, we accept. Or that is the purpose of this platform, to educate us to reject, to denounce this scourge that affects our society.

*Prioritatile orasului tau/Priorities of your city* ([prioritatileorasuluitau.ro](http://prioritatileorasuluitau.ro)) is an online platform, conceived as a bridge between local authorities and citizens, based on concept of participatory budgeting. The platform aims to involve citizens in defining the development priorities for their community. It can be used both by local authorities in the public consultation process of local development strategies, as well as by the members of civil society. The platform does not intend to replace the decisions of local authorities, but to contribute in taking better and more informed decisions. The main objective is to facilitate a process of identifying a list of priority projects in the long list included in the local development strategy. The easiest and the most effective tool for prioritizing a list of projects is a clear operational budget for a clear implementation period. Therefore, the first step in this exercise of prioritization is the analysis of the local development strategy approved by the local council. A second step involves the identification, from the development strategy approved by the local council, of a package of priority

projects/programs of which values is less or equal to the operational budget. A first proposal of the priority programs/projects will be made by those who assume the use of this platform in their communities, either local authorities or civil society representatives. This proposal will be available to the public, to collect opinions and suggestions. Those who access the package of priority projects for their city have more options available: they can agree with the first proposal; they can agree with a proposal made by another person; they can make budget reallocations from a project/program to another; they can add other project proposals in the same intervention area. Each option registered in the system will be stored in a database and the result of this process will be made available to local authorities to be taken into account in establishing the list of priority programs/projects. And once the list has been established, the users of the platform can monitor the implementation of the programs/projects. For now, this online tool is available for five Romanian cities (Cluj-Napoca, Bucuresti, Ploiesti, Alba Iulia and Pitesti), in which citizens can contribute also in this way to influence the future of their community.

*Cine ce a promis/ Who promised what* (cineceapromis.ro) is an online platform built and supported by two NGOs, Ratiu Center for Democracy and Resource Center for Public Participation, that seeks to monitor the promises made during the electoral campaign and the extent to which there are, or can be, fulfilled. The platform centralizes the promises during the electoral campaign and the extent they are implemented after the candidates take the office. Users can create an account to receive news and updates and to add relevant information about the elected representatives. They can actively contribute by adding content related to the candidates' promises and their achievements. The president, the Romanian representatives in the European Parliament, deputies, senators, the presidents of the county councils are all monitored in an attempt to hold accountable elected servants, given that during the electoral campaign hundreds of promises are made, most of them unrealistic, exaggerated or disconnected from the community.

#### 4. Conclusions

Such collaborative platforms are useful exercises to increase transparency, to control corruption and to fill the gap between citizens and institutions. From our point of view, ICTs have the potential to refresh traditional forms of participation and interaction between citizens and their elected representatives and to fight against the lack of civic and political participation, which is undoubtedly one of the most relevant problems even in consolidated democracies.

As shown by data used in this article, Romania ranks last in the European Union in 2015 in terms of digital inclusion and literacy, digitization of business and public services, so that it should make steps forward to cutting red tape and transparent administration and to better exploit the benefits of new technologies. Efforts should be on all sides. Institutional firstly, by improving citizens' access to online services more diversified and sophisticated, by encouraging participatory processes and dialogue with civil society and citizens and not the least by embracing ICTs-enabled transparency measures. There is a need for better integration of online communication in the public administration, by training officials assigned to this type of interaction with the public, by setting clear rules, procedures and contents approved for online communication.

On the other hand, citizens have the responsibility to not accept corrupt practices and to use the levers that allow them to get involved in decision-making. By changing attitudes of acceptance of corruption, they can ultimately protect themselves from the corruption. Both school and civic organizations should play a more active role in learning



civic attitudes and skills, in mobilizing people around issues of civic interest, incorporating new technologies in this process. Only through joint efforts and through a real partnership between public authorities, school and civil society we can talk about democratic governance.

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## ROMANIA'S PRESIDENCY OF THE COUNCIL OF THE EUROPEAN UNION IN 2019: PRIORITIES AND DRIVERS

*Mirela MĂRCUȚ\**

**Abstract.** *This article seeks to explore possible priorities and drivers Romania may use during its tenure at the Council in 2019. First, it presents the legal framework offered by the Lisbon Treaty and a short discussion on the permanent presidency versus the rotating presidency. Second, it examines previous presidencies to pinpoint possible drivers in the formation of priorities of the rotating presidency. Finally, it provides a brief analysis on possible priorities and drivers of the Romanian presidency.*

**Keywords:** *Romania, rotating presidency, Council of the European Union, national preferences*

### Introduction

There is a delicate balance between benefits and responsibilities when discussing Romania's membership of the European Union. One of the biggest benefits is that Romania is a net beneficiary of the European budget. On the other hand, the membership has its responsibilities, one of which is the presidency of the Council of the European Union, a six-month period during which the member state gets to shape the European agenda and focus on certain priorities.

Since its accession to the European Union, Romania has never held this position and is scheduled to chair Council meetings in the first half of 2019, twelve years after the moment of accession. Because the state has yet to establish its position at the European table, the presidency may come as an opportunity for Romania to assert itself in the European arena. On the other hand, without experienced leadership and a well-thought strategy, it may be difficult for Romania to be at the forefront of the European leadership.

After discussing the rotating presidency system, this paper will delve into the leadership of the Council and the role of the rotating presidency. Next, it will discuss past presidencies and their priorities to form a framework for a possible strategy for the Romanian presidency.

### Legal framework within the Lisbon Treaty

The discussion on the rotating presidency within the Council must start with an institutional delimitation, which is visible in the Lisbon Treaty. The institutional system of the European Union is presented in Title III, article 13, with the following introduction: "The Union shall have an institutional framework which shall aim to promote its values, advance its objectives, serve its interests, those of its citizens and those of the Member States, and ensure the consistency, effectiveness and continuity of its policies and actions" ('Consolidated Version of the Treaty on European Union', 2012, p. 10). Expressing the dual legitimacy, from the citizens and the national level, the article lays the

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foundation of the functioning of the institutions, two of which are relevant for the purposes of this research. Hence, we must discuss about the European Council and, respectively, the Council.

At article 15, the responsibilities of the European Council are laid as such: “The European Council shall provide the Union with the necessary impetus for its development and shall define the general political directions and priorities thereof” (‘Consolidated Version of the Treaty on European Union’, 2012, p. 11). In fact, the European Council is a major decisive factor for the Union overall and it relies on consensus as a decision-making tool, aiming to build cohesion and to bring together all Member States. On the other hand, considering that it consists of heads of state or heads of government of Member States, the European Council is the meeting place for national interests. In terms of the leadership of this institution, the Lisbon Treaty has brought an innovation, in an attempt to build up the European leadership, namely the permanent position of the President of the European Council, whose responsibilities are the following: “chair it and drive forward its work, to ensure the preparation and continuity of the work of the European Council in cooperation with the President of the Commission, and on the basis of the work of the General Affairs Council; to endeavour to facilitate cohesion and consensus within the European Council; to present a report to the European Parliament after each of the meetings of the European Council” (‘Consolidated Version of the Treaty on European Union’, 2012, p. 11).

The second institution involved in this debate is the Council. The role of the Council is detailed in the Treaty on European Union at article 16 (1): “The Council shall, jointly with the European Parliament, exercise legislative and budgetary functions. It shall carry out policy-making and coordinating functions as laid down in the Treaties.” The leadership of the Council has been preserved to the rotation system. This marks a shift in the organization of the European Council and the Council of Ministers respectively, which have been separated in terms of leadership since this innovation. Essentially, the mission of the President of the European Council is to bring Member States together in negotiation to ease the decision making process, while, on the other hand, the President becomes “one of the faces” of the European Union, along with the President of the European Commission and the President of the European Parliament. Each one represents a different level of the EU, with the President of the European Council representing the national level, the Member States.

As mentioned before, the former system, the rotating presidency, has been maintained only for the Council level. In this sense, the Treaty states the following: “The Presidency of Council configurations, other than that of Foreign Affairs, shall be held by Member State representatives in the Council on the basis of equal rotation, in accordance with the conditions established in accordance with Article 236 of the Treaty on the Functioning of the European Union” (‘Consolidated Version of the Treaty on European Union’, 2012, p. 12). The cited article, letter b, states that the European Council shall adopt by a qualified majority “a decision on the Presidency of Council configurations, other than that of Foreign Affairs, in accordance with Article 16(9) of the Treaty on European Union” (‘Consolidated Version of the Treaty on the Functioning of the European Union’, 2012, p. 107). The rotation system has been a form of political representation at the Council level for decades, an expression of the equal character of Member States at the Community table and has been characterized as “remarkable”, due to the level of the entrusted responsibilities, compared to other international fora where this system functions (Ben Crum, 2009, p. 689).

### **The prerogatives of the rotating presidency**

Even if the rotating presidency system has split between the European Council and the Council, the control of the Member States is still prevalent for these two European institutions. One Member State chairs the meetings of the Council of Ministers for a period of six months, based on the treaty assertion that “each institution shall act within the limits of the powers conferred on it in the Treaties, and in conformity with the procedures, conditions and objectives set out in them. The institutions shall practice mutual sincere cooperation”(‘Consolidated Version of the Treaty on European Union’, 2012, p. 10). The power of these institutions comes from the treaties, which are negotiated by the states. Hence, the functioning of the Council depends on the will of the states. In this sense, this shift (i.e. the creation of a permanent presidency for the European Council) polarized the states, since some feared that this would undermine the presence of some smaller Member States in the leadership of the European institutions(Ben Crum, 2009, p. 691).

Nevertheless, the Council functions by the same principles before this change, with the “presidency of the Council rotating among EU member states every 6 months”. “During this 6-month period, the presidency chairs meetings at every level in the Council, helping to ensure the continuity of the EU's work in the Council”(Council of the European Union, no date). Given that there is a chance of policy fragmentation due to this rotating presidency, the Lisbon Treaty has put together a system, wherein member states “holding the presidency work together in groups of three, called trios”(Council of the European Union, no date). According to Declaration on Article 16(9) of the Treaty on European Union concerning the European Council decision on the exercise of the Presidency of the Council, comprised within the Treaty on the Functioning of the European Union, “the Presidency of the Council, with the exception of the Foreign Affairs configuration, shall be held by pre-established groups of three Member States for a period of 18 months. The groups shall be made up on a basis of equal rotation among the Member States, taking into account their diversity and geographical balance within the Union”(‘Consolidated Version of the Treaty on the Functioning of the European Union’, 2012, p. 297)

This system does not fragment the policies and priorities of the Union, given that the member states work together on long-term goals to “prepare a common agenda determining the topics and major issues that will be addressed by the Council over an 18 month period”. (Council of the European Union, no date). Separately, each state prepares its own six-month agenda based on the overall goals established within the trio. Essentially, the trio must work together to prepare a mission statement for the next period on what they will focus. This trio initiative can be interpreted as a means of building bridges and enhancing cooperation between Member States, especially considering the prerogative that the groups are established based on diversity and geographical balance. The current trio is Netherlands (January – June 2016), Slovakia (July-December 2016) and Malta (January-June 2017) (Official Journal of the European Union, 2016, p. 3).

The Presidency of the Council has two main tasks: to plan and chair meetings of the Council and to represent the Council in relations to the other institutions(Council of the European Union, no date). It may seem that the tasks are more of a ceremonial and procedural note, but each Member State has the opportunity to push forward certain priorities, apart from the overall policy views adopted by every Member States.

For instance, the current holder of the presidency is Malta, whose priorities are centered on a concept – rEUUnion. Following the tumultuous 2016, the mission of the new chair centers not on “a legislative programme”, but on “a philosophy and a way of working”, which means “listening to and working for the people, sharing the burdens and

benefits of membership of the EU fairly between people and states and restoring a sense of cooperation and neighbourliness in these increasingly fractious times” (Malta EU, 2017, p. 6). Malta’s program internalizes the challenges facing the EU (migration, regional and global instability, rise of nationalism) and pushes forward an agenda focused on the people of the European Union. In this sense, we observe that the priorities of the Maltese presidency represent both internal priorities, such as the need to reform the “Common European Asylum System” and to “ensure that the issue remains at the top of the political agenda”, while recognizing that Malta is indeed on the frontline of the migration debate, given its geographical location (Malta EU, 2017, p. 7). The issue of migration is used as justification for the need for more cooperation and sharing of responsibilities between Member States, as well as the focus on security challenges affecting all Member States. In this sense, the Maltese Presidency approaches another internal issue and puts it on the European policy agenda, namely the Mediterranean neighbourhood, as follows: “Europe’s security and prosperity are interlinked with that of our neighbourhood. Countries bordering the Southern Mediterranean are facing serious challenges, including armed conflict, terrorism, political instability and radicalisation. Aware of the potential ripple effects of instability beyond Europe’s borders, we will focus EU engagement towards the stabilisation of our neighbourhood, with particular focus on Libya” (Malta EU, 2017, p. 7). Thirdly, another national issue befitting the island of Malta is a priority for the presidency, namely “to ensure not only the sustainability of our oceans, but also effective governance to promote growth in areas such as maritime tourism and sea freight” (Malta EU, 2017, p. 7).

The example of the Maltese presidency points to the idea that the structure of the policy priorities of states within the trio are made from external conditionalities combined with internal priorities. While the former are subject to change from one presidency to another, due to the unstable international climate, the latter are timeless priorities stemming from the specificity of the Member State, its positioning within the European Union, as well as its internal challenges. Another example worth mentioning for the purposes of this research is the Hungarian presidency in June 2011, whose main priorities centered on strengthening the role of Central Europe within the EU and the world, as well as working towards creating an EU Roma Strategy (*The Hungarian EU Presidency [Archived]*, 2010). These priorities are a result of its internal interests, given that Hungary has an important Roma minority and that it is a part of the Visegrad group focused on boosting Central European countries. The Commission adopted a Communication entitled “An EU Framework for National Roma Integration Strategies up to 2020”, driven by the need to offer a European response to a European issue.

On the other hand, 2011 was a critical for the European Union and the priorities of the Hungarian presidency were calibrated accordingly. In this sense, the presidency put forward priorities to tackle the economic crisis, the need for EU policy reform and enlargement. The reform of the CAP, the launch of the European Semester and work towards a common energy policy were some of the initiatives (*The Hungarian EU Presidency [Archived]*, 2010). However, the main role of the Hungarian, Maltese or any other presidency is to push forward overall long-term policy issues, such as enlargement, policy reform, etc (BalázsVizi, 2011, p. 124).

Even if the role of the rotating presidency has diminished since the creation of the permanent president of the European Council, the examples from above point to the fact the presidency can transform into a forum for the state to combine long term policy priorities of the European Union with national priorities.

### **Possible priorities for the Romanian Presidency**

Romania has never held the presidency of the Council of the European Union. It will have the chance to do so in the first half of 2019. The trio will be composed of Romania, Finland and Croatia (Official Journal of the European Union, 2016, p. 3). Two of three states are new members of the European Union from 2007 and 2013, respectively. Regarding the treaty requirement that the trio should respect the diversity and geographical balance within the European Union, we must notice that the trio is slightly balanced, as the three represent the Balkans/Mediterranean region, the North, and Central-Eastern Europe.

This section aims to provide a possible outlook the possible priorities of the Romanian presidency in the framework represented by Europe-wide issues and national priorities. We assume that the trio strategy will focus on Europe-wide issues and long term initiatives, but the main research question now refers to the national interests that may develop into policy priorities for the Romanian presidency. The analysis will begin from an overview of past priorities, geographical and geopolitical issues, as well as internal challenges, such as regional development, minorities etc. They will be connected to current Europe policy priorities that have a time frame, such as Europe 2020 strategy, but the long term priorities of the trio cannot be firmly established given the unstable political and economic climate.

The positioning of the presidency is not subject to major policy discussions within the EU, except for the possible Brexit that may be completed in 2019 if negotiations go as planned. However, the trio starts with Romania and the efficiency of the presidency will be under scrutiny, because presidencies work on "inherited agendas" (Andreas Warntjen, 2008, p. 318). The success of the trio will depend a lot on the efficiency of the presidency that starts the agenda. In this sense, the view of the President of Romania regarding the opportunity is "his country's chance to prove itself to the rest of Europe" (Politico, 2016). Romania has been criticized by European institutions for the pace of European funds absorption, especially with regards to frauds in this sector. Moreover, Romania has been left out of the Schengen Area and is still under monitoring under the Mechanism for Cooperation and Verification, which tracks the progress made with regard to judicial reform and the fight against corruption. The issues related to the access to the Schengen Area and the Mechanism may turn out to become important national priorities for the Romanian Presidency. Considering the current political turmoil in Romania tied to the judicial reform and the continued fight against corruption, it seems less likely that the MCV will be eliminated by 2019 and Romania will enter the Schengen Area. Hence, we operate in this research on the assumption that the MCV will not be eliminated for Romania and that we will not enter the Schengen Area. Further evidence for this assumption is the unstable international climate, the terrorist attacks in major European capitals in 2016, which contribute to a more cautious approach from the European partners in issues of free movement, border control, and security. In this sense, the overall outlook of the Romanian presidency does not depend only on the balance between national priorities and international challenges, but we must also add the balance between the need to prove that "we can deal with complicated problems" (Politico, 2016) to this equation. The priorities and program of the Romanian presidency may be influenced by the need to "make national sacrifices in order to be perceived as a productive and efficient Presidency" (Andreas Warntjen, 2008, p. 318).

### ***Securing free movement within the European Union***

One possible priority for the Romanian presidency stems from a national priority and a European issue, namely the freedom of movement. The national preference refers to the commitment to enter the Schengen Area, not only for air transport, but also for the other types of borders. The European issue refers to the negotiations on the Brexit, which are expected to end by the first half of 2019. Securing freedom of movement within the Union should become a mission statement for the Romanian presidency, because it puts the European citizen, the consumer, and the entrepreneur at the center of the discussion and emphasizes the importance of one of the cornerstones of the Union, namely the Single Market. With the expected exit of the United Kingdom from the Single Market, the Romanian presidency should focus on putting together a series of measures to safeguard and protect the Single Market.

Moreover, considering its geographical position, as well as the other countries within the trio – which have external borders –these measures should be doubled by a strengthening of the external borders of the European Union. Issues like the strengthening of the European border police force are deemed to become important actions to reaching this objective. These efforts can also be considered tools for the pursuit of Romania's national preference, the accession to the Schengen space.

### ***The European Neighborhood***

As a state with EU external borders, Romania is not only in charge of border security, but also must have a sustained commitment towards the neighborhood. Hence, another priority of the Romanian presidency may refer a renewed interest in the European neighborhood, especially in the context of rising Euro-skepticism and nationalism in the neighborhood, like in the case of Moldova. Romanian minorities are present in all three non-EU countries that neighbor Romania: Serbia, Ukraine and Moldova. The national priority refers to the need to ensure protection of minorities, while the international/European challenge refers to the need to create a safer neighborhood for the European Union, while preparing countries for a possible enhanced cooperation with the Union.

### ***Entrepreneurship and the IT sector***

The Single Market has been the subject of different strategies in the past decade and the most recent one helps provide a new boost to the project with initiatives, like a focus on the collaborative economy, entrepreneurship, as well as the strengthening of the services market and a commitment for the creation of a single market for intellectual property (European Commission, 2015). Given the lack of entrepreneurship culture within Romania, as well as the EU, especially in the IT sector, Romania can commit its presidency to ensure the development of entrepreneurship in the IT sector by declaring 2019 'the year of the entrepreneur'. This can provide new impetus for pursuing the entrepreneurship culture in the educational system and help promote the digital sector for the purposes of the Digital Single Market.

### ***Conclusion***

The purpose of this article was to provide an overlook on possible priorities for the upcoming Romanian presidency of the Council of the European Union. By working on the legal framework offered by the Lisbon Treaty, we emphasized the diminished importance of the presidency because of the creation of the permanent position of President of the European Council. On the other hand, the Council has the opportunity to



influence decision making and the state holding the presidency is the main driver of negotiations.

Based on previous examples, we conclude that presidencies tend to have priorities based on a mix between national interest and international challenge. Romania will hold the presidency in the first half of 2019 and we have concluded that it will have another driver in its presidency, namely the need to prove that Romania is not a second-tier member and to be efficient and productive.

We have identified three major themes that may be pursued during the tenure, the European neighborhood, securing the freedom of movement and entrepreneurship and the IT sector.

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## DISCURSIVE STRUGGLE AND SOCIAL CHANGE IN SOUTH AFRICA IN THE MID 1990'S

**Dan-Ionuț PETRICA\***

**Abstract.** *Discourse has a twofold significance: it shapes reality, whilst simultaneously getting shaped by reality. In South Africa, a counter hegemonic discourse econcoured both by internal and external factors managed to first dislocate, then replace the narratives of apartheid, bringing about a social change which was convenient for a historically oppressed part of society. The majority of the population adhered to the new narrativ, because it granted them convenient identities, and detached them from the social stigma that had been perpetuated in their detriment for decades. This article observes the social changes in South Africa through the lens of Discourse Theory.*

**Keywords:** *discourse theory, hegemony, dislocation, split subject, nodal point*

### 1. Introduction

This paper aims to put the process of transition and democratization in South Africa through the scrutiny of Discourse Theory. In South Africa, since the early 1990's, clearly separated interest groups can be identified and studied. Each of them can be found immersed in its own greater discourse, forever competing to define and shape the social and political reality of the country. Although the *apartheid discourse* - a reminiscent narrative of the colonial era, which has been tailored to fit post-colonial conditions - and the new wave of *anti-apartheid discourses* remain most striking to the eye, even after the end of apartheid and throughout the process of democratization, certain tensions are present amongst co-existing citizens and their political representatives. These tensions manifest themselves through discursive patterns within the public arena. However, given the scope of this paper, we will limit ourselves to the two antithetical forms or rhetoric already introduced: the *apartheid discourse* and the *anti-apartheid* one; although the *colonial discourse* will be mentioned in certain circumstances as a source of inspiration for the former of the two.

The significance of the discursive struggle, permanently present in most societies, but particularly relevant for the case of South Africa, can best be perceived through one of the major theoretical approaches in the field of political studies, namely *Discourse Theory*, first and best exposed by Laclau and Mouffe in a number of works, of which their seminal work *Hegemony and Socialist Strategy* needs to be noted.

In the first, shorter, part of this paper, the founding principles of Discourse Theory will be exposed and delved upon, to allow for a better understanding of the main operational concepts proposed by Laclau and Mouffe, in order to attain an effective discourse analysis and, subsequently, a relevant social analysis. In short these are *floating signifiers*, *nodal points*, *identity* and *meaning*, *split subject* and *hegemonic discourse*, the

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last of which was coined by Antonio Gramsci and utilized by post-Marxists, only to be embedded in and transformed by Discourse Theory.

In the second part of the paper, the constructs above will become tied with certain elements of South Africa's modern history, in an effort to view this state's recent transformation through the lens of Discourse Theory.

## 2. Discourse Theory – Short Framework

Discourse Theory is grounded in a combination of post-Marxism and structuralism. While the first comes with a *modus operandi* of thinking about the social world, the second, namely structuralism, contains a theory of meaning. Laclau and Mouffe have successfully combined both lines of thought into a single post-structuralist theory. Within this theory, the entire social spectrum is seen as a multitude of intertwined processes, which ultimately create meaning. Saussurian structural linguistics also play a distinct role as a source for inspiration for the pair of authors. Ferdinand Saussure's argument was that signs are two-folded: they contain both form and content, latched discretionarily to one another (Saussure, 1960). Thus, meaning is not inherent to words, it is a result of socially constructed conventions; only through these conventions meaning being attributed to sound. Through structuring, individual *signs* gain meaning from their relation to other signs. Thus, structure is a social institution which changes in time (Philips and Jorgensen, 2002: 10). Consequently, the relationship between reality and language is also a discretionary one. For Saussure, as briefly mentioned, signs acquire meaning through differentiation amongst themselves. Signs are thus stable. Laclau (1993: 433) comes with a theoretical twist, by arguing that a sign's acquisition of meaning still happens through differentiation, but that the signs from which a particular one differs are changeable according to context; namely sign meaning is reliant on the context in which the sign is used. The basic difference post-structuralists unveil is the fact that structures exists, but their state is not fixed. This is particularly valuable when trying to cope with one of the main critiques that structuralist tradition faces: its ability to analyze change.

Michel Foucault has had yet another important role in shaping discourse analysis and subsequently in providing a base for Discourse Theory. Foucault (1972: 117) considers that truth is determined by different regimes of knowledge. Furthermore, he develops a theory according to which *power* creates *knowledge* and produces *discourse* (Foucault, 1980: 119). Thus, power is binary: on the one hand, it is repressive, on the other, it is productive. For Foucault, power is responsible for the creation of the social world, for the discourse surrounding this creation and the way that all social phenomena are perceived. Alternative ways of being and talking are thus ruled out (Philips and Jorgensen, 2002: 10). This central idea has been further developed by Laclau and Mouffe, who see the political environment and the discursive one as co-existential; the entire sphere of politics can be seen as a sphere of discourse. Emancipation is considered necessary, however it is unattainable. In the infinite struggle to attain it, we deploy serious efforts which change the world as we know it. The political and the discursive remain omnipresent within society and the world itself can be perceived as a series of distinct discourses, one opposing the other. By drawing from the sources presented above, coupling Derrida's (1998: 78) notion of *writing*, adding Lacan's dualist view of the relationship between *signifier* and *signified* to the mix, the theory of hegemony appears. For Laclau and Mouffe, any discourse has a counter-discourse and every hegemony has a counter-hegemony; the relationship governing the pairs being, of course, one of antonymy.

Now, we shall address the five main points offered by Jacob Torfing (2005: 14-15) to observe how they can be applied in the case of South Africa in the early 1990's. But, before we commence, one must briefly expose the situation in the period discussed. After a colonial history, in 1960 South Africa gained independence from the British rule and became a republic. Throughout this period, a regime of apartheid was enforced, fully separating the country on racial criteria - the white population being granted institutional superiority. In 1994, after acute pressures from Western states, the system of apartheid was dismantled, and the state transitioned to majority rule. General elections were held in South Africa in April, the same year, with universal suffrage. This is but a simplified and brief historical that will aid us in our analysis. The main question that needs to be posed here is *what was the impact of discourse in all the transformations that took place in the discussed period?*

### 3. The discursive background

Laclau and Mouffe explain that forms of political practice take place on a discursive background which has a certain history attached to it. All that is said and done is but a sum of something said and done earlier (Mişcoiu, 2008: 20). To exemplify, South Africa's post-apartheid culture prided itself with being innovative and new in several regards, but at the same time, it was a sum of various manifestations of Western modern culture, now appropriated. The dominant discourse in South Africa suffered rapid and consecutive transformations, each with a clear impact on political and social life. After the South African army had been decisively defeated in Angola and sanctions were crippling the economy, both internal and external pressures had become visibly undefeatable for the acting president, and the new discourse opposing a historical narrative of extreme racial discrimination was now empowered more than ever.

A discourse is but a fixation of meaning that takes place in one particular domain, with all its signs being moments. *Nodal points* are signs with the capacity to structure other signs around them (Laclau and Mouffe, 1985: 112). In the *apartheid* period, the word 'apartheid' itself was the strongest signifier and, possibly, the dominant nodal point within the entire system of discourse in South Africa. Afterwards, when a shift took place, and the discourse started to show its flaws, one of the main nodal points becomes (*liberal*) *democracy*, being coupled with other central discursive signifiers, such as *equality*, *reconciliation*, or *peace*. As strong signifiers manage to dislocate others - with a long standing history of dominance - a clear need to reshape the environment in which discourse perpetuates itself appears, in order for the dominant discourse to be fitting to reality and vice versa. The new central signifiers acquired strength due to an absence of effective democracy and equality amongst white and black citizens and due to the fact that there was impatience towards populating the term with different meanings. Democracy was yet another empty signifier that changed its meaning through context: it became rearticulated. Through the incorporation of Western values, the old signifier became populated with new meaning - now being tied with equality for all citizens and universality regardless of race or ethnicity. This re-articulation of signifier meaning led to the creation of new identities. While there was one meaning granted to the term 'citizen' in the apartheid era, a new one came to take its place after apartheid had ended. During Mandela's term, *reconciliation* became a focal nodal point to discourse. It is worth mentioning that a multitude of nodal points reside at any one time within this web and that gaining primacy is influenced by a vast array of conditions and circumstances. In South Africa, the unique blend of external and internal pressure: a concomitant rise of a Western

narrative encouraging democracy and a native discourse prompting equality constituted the conditions in which political and social change could take place. It needs to be noted that in order for identities to be rearticulated, first the social constructs such as gender or race need to suffer alterations. This comes through emancipatory discourse, but the emphasis of language, although invaluable, is not sufficient. Emancipatory discourse aids the process of re-imagining one's position in society and their identity. This is mainly true for those that do not have the ability to yield power: the discriminated against or the ones that have not been represented fairly.

#### 4. The hegemonic struggle

Discourse is constructed through the means of hegemonic struggles that move towards the end of creating a political and moral leadership (Laclau and Mouffe, 1985: 21). There is an endless series of discourses competing for primacy. Any discourse is composed of a *background* and *actions*. Discourses that offer a credible representation of the social environment, whilst simultaneously displaying a capacity to control both the intellect and the emotions of a large proportion of the population, attain hegemonic status. However, the issue is far more complex than it may seem at first glance, especially in cases where the division of power is a cause for blatant discrepancies - such as in South Africa. The whites have had not only the means of discourse at their disposal, but have been the beneficiaries of centuries of empowerment. The blacks, an oppressed minority, gradually shaped a reactionary discourse while being rendered politically powerless. It is here that we best observe the mutually constitutive relationship between discourse and power: while power vested in one entity gives birth to the discourse of an opposing such entity, the mechanisms of power aid the perpetuation of the former discourse, until effective confrontation can take place. When a counter-hegemonic discourse has matured, closely observing the defects of its adversary, it can move to dethrone it. Hegemonic discourses rely on (over-)simplification (Hajer, 1993: 47), bringing together a multitude of identities with different backgrounds, ideas and interests and combining them to achieve coherent wholes. Howarth (1995: 55-78) points out that these *storylines* that shape identities succeed to stay together only through the production of imagery and phrases: empty signifiers that lack signification and show the limitation of each group created through simplification. A group's identity is limited and depends on core divergences with other groups. The National Party (NP) of South Africa, which governed from 1948 until 1994 was a collection of individual identities, in the sense briefly explained above, having the purpose to maintain political control in the hands of a white minority. This was the only means to insure their survival on the country's political stage, as the whites suffered in numbers and their electorate had alternatives. The striking divergence with the other group was about who is entitled to exert control. And here the discourse of the NP splits into several intertwined narratives, all promoting the same principles, and all having fixated *apartheid* or *separateness* as a central nodal point. The NP was not the only party present in national politics during this immense timespan; however it shaped the hegemonic discourse even with the help of other white political formations - divergent in some respects - but which also advocated separation on the basis of race. After splits (in 1969 and 1982) and reformation attempts mainly under Pieter Willem Botha, their discourse remained uncontested with regards to the issue of race, although they were contested on several other issues. We may speak of a dominant discourse originating from the NP, but the group supporting such a discourse was far more numerous, engulfing virtually all parties present on the country's political scene. In lack of true contestation, a

discourse thrives and creates the means to replicate itself and become even more powerful, by shaping a reality in which it is perceived as the only logical possibility. Through simplification one can achieve an *ideological totality*. Distinct elements have one strong common point, to create one representation of reality which cannot be attacked because it is true to our views or ideas about the surrounding world. This is generally applied, but the case of South Africa demonstrates the point beyond doubt: as differences of opinion regarding a fixed element of discourse, namely the main signifier/nodal point appeared, the discourse's stability and, later, its hegemony started to decline. The discourse was replaced at a moment when external and internal antithetical discourses stated colliding with it, and when groups advocating for it moved to the side of the counter-discursive group. The African National Congress (ANC), the party contesting apartheid and all its mechanisms benefited both from a Western form of discourse advocated by liberal democracies and from the migration of individuals from within the ideological totality. The West advertised a democratic discourse because it was in line with their view of the world and members of the other, white-led opposition parties, gradually attached themselves to the emerging counter-hegemonic discourse. The issues are inter-related: the Western discourse was imposed by the use of sticks (economic sanctions), which enabled a repositioning amongst advertisers of the apartheid narrative. It is difficult to measure to what degree parties such as the Democratic Party or the Conservative Party (later the Freedom Front) were genuinely against a discourse they had adhered to and developed earlier and what other elements encouraged a repositioning of identity. Nonetheless, through this repositioning, the anti-apartheid discourse gained relevance, by the annulment of racial barriers in the construction of identity. If whites had their own discourse which had already created one reality and blacks backed up an opposing one -only menacing to provide the roots for another reality- however potent the second would be, through the use of political power by the first group, the substitution would have never taken place. Power, as Foucault (1972: 212-214) tells us, is not one single force that comes from state apparatus. The power of apartheid was promoted through an overwhelming number of channels, ranging from communication conducted through government-controlled media outlets to the informal conversations taking place in the streets, on a daily basis. Through the construction of antagonism and later, through stigmatization as a method of perpetuating this antagonism, a fundamental discrepancy is created. Our adversaries are deemed essentially incompatible to us. This can be seen in the way the racial barrier was constructed in South Africa; race has been placed on the highest pillar possible inside discourse, gaining primacy even to humanity itself. This issue will be further developed in the following part, but one remark is in order: the opposing white parties to NP governance succeeded in dismantling the racial barrier proposed by the hegemonic discourse, by breaking away from the identity assigned by it and taking on a new identity, ascribed by the reconciliation/democratic discourse. In the dominant discourse the fracture was insurmountable, but by strategic repositioning, the opposing parties gave a great blow to the old narrative, in the same time aiding the counter-discourse.

### 5. Social antagonism

Identity articulation, as hinted above, is linked to the construction of *social antagonism*. Social antagonism lies dormant within society, and becomes operational by granting it power through discourse. This process of empowering antagonism takes places through *simplification*; taking a complex and heavily nuanced society and creating the image of a dualist block, marked by a unique source of tension. The body of individuals composing

a society is in itself a network; identities are shaped according to specific issues and it is virtually impossible to put together all the various identities as to analyze them monolithically. However, through simplification, one relevant political issue gains primacy, and identity relating to that issue it put under the scope. As social subjects consent or dissent with that issue, this specific identity becomes a general one for the individual, and separation into distinct camps or blocks is possible. This was done in South Africa first by the colonial discourse and later, by its reminiscence, the apartheid discourse.

Although identities are complex entities, seldom composed by overlapping elements even when antagonized, a stringent difference of race was used as an irreparable fracture point. Without discovering such a fracture, the capacity to create the other and dominate him does not exist. This antagonizing process has taken place in South Africa since the beginning of colonialism in 1652. Race is in itself a *discursive construct*, or a *social construct*, but the racial narrative has the peculiar capacity to exclude all other characteristics of the individual and create an identity based on genetic heritage – skin color and lineage. It becomes evident that we see the surrounding world through a racial lens that colors our world white, black, yellow, red, minority, or “other”. A social construct has two defining characteristics – it is ontologically subjective, but at the same time epistemologically objective. The fact that race is ontologically subjective means that this construction is contingent on various social groups and their general agreement or acceptance of such a condition. The epistemological objectiveness of race implies that it is a term produced by man’s consciousness in accordance with the facts of reality. It must also be stated that race has always been defined by the dominant group in society and it indicates differences in status. The status determined by which race you are, either includes or excludes one from broader social constructs and disables or enables certain powers. So, race is not only a construct, but in some countries, such as South Africa, it was generally accepted as an element of division, of otherness. A black could not be white and vice versa; the dominant discourse creating a general identity accordingly. Behavioral patterns thus emerge and, through repetition, the identity is assumed as something objective. Thus, by being placed in a position of power, the white elites of South Africa managed to rule uncontested (or poorly contested) for centuries. The hegemonic discourse which was in place in both the colonial and post-colonial apartheid eras had constructed such an identity for blacks that the emergence of a secondary, counter-hegemonic discourse to rival the first was, for a long period, impossible. The use of a *nexus of race and place* (Dixon, 1997: 38) aided not only in assigning a particular identity – that of inferior being – to blacks, but, by considering physical topography something that influences differential development and encourages the continuity of a set hierarchy, tribe relocation programs were meant to assure the survival of the status quo and its infinite reproduction.

In the apartheid era, the existence of a fundamental cleavage had become empowered by the former discourse of the colonial rule, proving once again that any discourse is a sum of all other discourses both present and past. The dislocation of a discourse can thus happen in two ways: by *transformation* and *replacement*. In the first case, one discourse comes into contact with conflicting narratives that manage to fragment it, but do not possess enough strength as to replace it. A transformation happens within the narrative, urging for an alteration – the discourse becoming a hybrid product, containing both hegemonic and counter-hegemonic characteristics – and reality is shaped accordingly. It can be affirmed that in many respects the apartheid discourse was milder than the one it preceded; nonetheless we cannot speak of a *de facto* replacement. Signifiers change places and become overflowing with different, albeit sometimes similar meanings in the web and



nodal points interchange positions, but this is done while still holding a position of centrality. An effective replacement takes place when the counter-hegemonic discourse gains so much momentum and power, that nodal points shift in such a way that they become alienated from the system - cast aside - and replaced by signifiers which had previously been in the periphery. The transition from the colonial narrative towards apartheid had been a mere transformation; the antagonistic discourse of the oppressed putting just enough pressure as to provoke a slight rearrangement inside the discourse. The transition from apartheid to democracy, however, has been cataclysmic for the system of dominant discourse: it has been displaced to the verge of annihilation. In Laclau and Mouffe's (1985: 111) terms: transformation takes signifiers from the *field of discursivity* and embeds them within discourse, while replacement places an overwhelming number of signifiers of the old discourse within this field. The field of discursivity is a permanent resource of meanings, a direct result of the practice of articulation of meaning. Every meaning a sign has in previous and current opposing discourses is allocated a place in the field, but excluded from the dominant narrative, in order to achieve unitary meaning.

Placing a South African citizen amongst the blacks is not discursively neutral, it automatically reproduces a whole context which is specific to stereotypes surrounding blacks. In the same terms, it suggests the impossibility to change the structure of the biological: the characteristic of the individual being given, any form of negotiation is excluded. Placing the black individual in a certain context, as the apartheid discourse has done, forces him to become what he is seen as, constructing his own identity as an outcast and consolidating the identity of the white elites. Such patterns of constructing one's identity through discourse give birth to two distinct effects. On the one hand, the whites, as one of the two blocks present in society, see their identity reinforced. Perceiving the other as a menacing force primarily stirs up the need to strengthen our own identity and consolidate whatever form of unity we have adhered to. But here comes the backlash: by excluding the possessors of menacing identities, we not only force them into self-segregation, but we produce an alternative discourse to our own. In South Africa, this alternative discourse was credible and was left free to reproduce itself, up to the point when it could challenge the dominant discourse. As one element is excluded from discourse, it becomes a model for other elements. The excluded element remains latched in the discursive history. Here a flaw in the thinking of white elites during apartheid can be identified: the exclusion of elements from the body of dominant discourse has led to them being taken into the anti-apartheid discourse. The apartheid rhetoric was lacking in the sense that it was not flexible enough to accommodate its own diversity and failed in maintaining the idea of inescapable difference between blacks and whites. As voices became more and more diversified, with white citizens –members of the elites – joining the counter-hegemonic discourse, the defenders of apartheid stood but a frail chance.

## 6. The Dislocation of Dominant Discourses

As shortly presented before, a hegemonic discourse becomes dislocated when it faces events and processes which it fails to understand, let alone react to (Mişcoiu, 2008: 25). One commonality of virtually all discourses is their struggle to be comprehensive and accommodate the evolution of certain events, as to later explain these evolutions in an original manner. However, no discourse is permanent and sooner or later they become prisoners of their own finitude. Events that will destabilize a discourse inevitably always surface. Across this paper we have argued that discourse renders reality through the mechanisms of creating identity and power. Until the emergence of Discourse Theory,

power was often perceived to be something external to the individual, a subject with false consciousness, deluded by institutions and not fully aware or interested in his potential. Discourse theory comes with a twist: power is not external, it is internal and it too can be attained through one discourse or another. For centuries, the black peoples of South Africa have been deemed as lesser, second-grade citizens when directly compared to their white counterparts. A particular set of colonialist discourses (pure colonialist discourse and post-colonialist, apartheid discourse) used subjectively constructed notions such as otherness in order to legitimize racist behavioral patterns and ideas. With globalization, the discourse of apartheid is unable to cope with the phenomenon and explain it; in this “global village” the accumulation of wealth – both material and cultural can happen foremost through Western styles of doing business and interacting in social circumstances. Thus, a successful participation in the international arena is dependent to the adaptation to Western discourses (Burman et al., 1997: 6). Impossibility for a discourse to adapt makes room for further contestation and announces its demise. In South Africa, the apartheid discourse had placed itself in this posture, for it could not adapt to the exigency of an external reality and pressure was rising internally. Subsequently, the rhetoric of apartheid was dislocated, and that of reconciliation concomitantly took the free place as dominant discourse. Apartheid was a practice of racial separateness, therefore its discourse was profoundly racialized, especially when referring to property ownership or political representation. A change of external conditions urged for a transformation inside discourse, but a transformation was no longer possible, as had happened when transition took place from the colonial rhetoric to the apartheid one. Ultimately, the discourse, which both shapes and reacts to reality, failed to fulfill both functions and was replaced with its nemesis.

### 7. The split subject

The political subject always appears inside discourse as a *split* or *fragmented* individual. The individual seeks to identify himself with a series of discourses that promise the fulfillment of identity (Mișcoiu, 2008: 27). When a hegemonic discourse is dislocated, the individual is left to search for his own identity. A total identity is unattainable, but the individual –unaware; naïve one might say - is relentless in his search, gaining satisfaction at the mere hint that one discourse could provide him with what he strives for - a plenary identity (Mișcoiu, 2008: 27-28). The Western view of the subject was given an alternative by Althusser, later taken up by Foucault. Althusser uses the theory of *interpellation* to affirm that subjects are placed in certain roles or positions by their patterns of speech (Althusser, 1971: 174). This theory is utilized by Laclau and Mouffe (1985: 115), who believe that subjects are actually *positions* inside the discursive structure. Following this line of thinking, it is reaffirmed that it is discourse which always assigns a position for its subjects, or a role; they are not autonomous and are permanently reliant on discourse. In addition, the subject is *split*: he assumes not only one role, limited by one discourse, but has a multitude of positions. In the case of discourses governing petty, everyday behavior, the split subject embraces several positions throughout his daily activities; however, when conflicting discourses - involved in a struggle to create the best representation of the social environment - arise, he is placed in distinct, sometimes antithetical positions concomitantly. The black citizen of South Africa was, discursively speaking, at the same time placed in a position of equality and in a position of inferiority in relation to the white citizens. The first, attributed by liberal discourse, the latter, by its counterpart. Needless to say, that the identity assumed and consequently the discourse

embraced by the blacks would be the one offering instant access to a higher social position. In the case of the whites, renouncing to inherited privilege and facilitating others' equality, gave strong reasons to oppose a liberal discourse. As explained before, due to a combination of internal and external factors, the apartheid discourse ultimately became displaced. Following the displacement, and the entrenchment of the new rhetoric as hegemon, the skilled work of the ANC, and leader Mandela, secured the position of liberal discourse. *Reconciliation* soon became a nodal point. Using reconciliation as a leitmotif in discourse and giving it importance, the narrative –which was not new, but newly empowered - strived to appeal to the sense of morality of the individual. Apartheid had been marked by *injustice* and *violence*, liberal democracy came with *equality* and *peace*. By ascribing a signified to a floating signifier with moral substance, the new discourse fortified its position of dominance. *Peace* and *reconciliation* had been part of the apartheid rhetoric, however they had no signified tied to them and had not produced any reality. Such strong, moral signifiers and nodal points have the unique ability to satisfy both intellectual and emotional components at the same time, thus, by actually creating a reality, or gaining a signified – in Laclau and Mouffe's terms – they act as fixators of discourse. By envisaging a reconciled community, the liberal discourse created an *imagined community*, where the individual was no longer fragmented and no longer searching for a fulfilling identity, because he has a promise that this identity had been obtained. A new apartheid discourse, even if it had appeared, would have been unsuccessful in gaining a dominant position, because the subjects would perceive it as the sole bearer of guilt for the lack of previous plentitude.

## 8. Conclusion

The shift of power from apartheid to democracy in the mid 1990's was possible in South Africa only in the conditions provided by a displacement of discourse. This displacement can be interpreted using working principles of Discourse Theory, provided by Laclau and Mouffe and summarized by Torfing. Throughout the paper these principles have been applied to the case of South Africa in order to permit a (hopefully) consistent account of why and how social and political environments suffered a clearly visible transformation.

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## THE SOCIAL IMPACT OF FOREIGN DIRECT INVESTMENTS IN THE HOST COUNTRIES: CHALLENGES AND OPPORTUNITIES

*Elena RUSU\**

**Abstract.** *The last years have experienced an increase in foreign direct investments, especially in developing countries, where the market is still at the beginning and the investment can grow faster than in developed countries. This is happening due to the liberalization of some economic policies in order to attract foreign direct investments inflows. Attracting foreign investors is not only influential for the economy; it has also a lot of consequences and effects on the social welfare of citizens in developing host countries. The purpose of this paper is to show if there is a social impact of foreign direct investments inflows to developing countries and to determine whether or not this investments contribute to the well-being of society. This paper also analyzes if the impact has a positive or negative effect and which are the current trends in the relation between investments flows and society.*

**Keywords:** *foreign direct investments, social development, social impact, life standards, developing country*

### Introduction

It is well known that foreign direct investments determine economic benefits for the host country and also, for the investors' country. Regarding the benefits for the host country, here we can mention technological development, increased employment and higher competition between the economic actors. In this context, the investing country receives the biggest part of the profit (earnings are repatriated), because it has the main office of the company. But, the impact of foreign direct investments goes beyond the economic field and manifests a higher impact in the society, being influential in terms of political, social, cultural, educational or environmental effects.

The impact of foreign investments can be seen as a catalyst because of its capacity for influencing society as a whole, which is transforming foreign capital into a positive adjunct in the development. Nevertheless, it is important to mention that this can also have a negative impact in the society. So, as the globalization continues to increase and the developing countries are fighting to attract more foreign investors, the negative social consequences of investments are possible to appear. In the context of moving a company from a country to another one because of the financial benefits of the investor (less taxes), the old host country will face for sure not only financial volatility, but also job losses, cultural tensions and political unrest.

This article is focused on the hypothesis that inflows of foreign direct investments have a noticeable social impact on a developing country and will try to understand how this fact influences the welfare state. Thereby, two main research questions are to be

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asked: (1) Is this social impact positive or negative in nature? And (2) What are the current trends of the relation between investment flows and societal development? In order to depict an image as accurate as possible, the main concern of this paper will be to identify the most important factors that determine the social impact of FDIs.

### **Is the social impact a significant actor?**

The economic benefits of FDI inflows are easier to be demonstrated by using quantitative data like GDP, number of employees, profit, fiscal value, while the contribution to social development is more difficult to be quantified. Global foreign direct investment inflows fell by 16per cent in 2014 to \$1.23 trillion, down from \$1.47 trillion in 2013. The decline in FDI flows was influenced mainly by the fragility of the global economy, policy uncertainty for investors and elevated geopolitical risks (UNCTAD, 2015, p. 2). More than that, economic advantages are easier to be obtained without realizing higher social progress. This is the case when investors and governments are looking only for a rapid economic growth, when the host country is facing real poverty or corruption problems, and when the investments are disproportionately targeted to certain industries such as natural resources.

From a long time ago, foreign investments were more oriented towards natural resources and extraction because of the advantages of these practices. Why investments in industries like natural resources determine most of the time only economic benefits? It is happening because this type of investments is not always taking care about protecting the environment of the host country and can lead to high levels of pollution, it is creating jobs for a specific group of employees (most of them are men) and is looking for a higher profit in a short period of investment, without being sustainable. Consequently, when the investor is looking for a rapid economic growth, the social benefits are moved on the second place, which demonstrates that not all investments are equal and have the capacity to maintain the cycle of benefits between economy and society.

A study developed by Deloitte UK<sup>1</sup> in association with Social Progress Imperative<sup>2</sup>, demonstrates how making smarter strategic investments specific policies focused on driving social progress can attract FDI, which in turn advances both economic and social development<sup>3</sup>. The report concluded that social progress factors such as infrastructure, education, and personal and political security can help attract overseas investment. In the same time, foreign direct investments are able to sustain a country's future social progress through specific support – such as investments in healthcare and education – and indirectly through employment and higher incomes<sup>4</sup>.

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<sup>1</sup> Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee, and its network of member firms, each of which is a legally separate and independent entity. Deloitte provides audit, tax, consulting, and financial advisory services to public and private clients spanning multiple industries.

<sup>2</sup> The Social Progress Imperative is registered as a non-profit organization in the United States, and its mission is to improve the lives of people around the world, by advancing global social progress by: providing a robust, holistic and innovative measurement tool—the Social Progress Index; fostering research and knowledge-sharing on social progress; and equipping leaders and change-makers in business, government and civil society with new tools to guide policies and programs.

<sup>3</sup> Deloitte UK Company, *How social progress develops with and helps attract foreign direct investment*, available at [<http://www2.deloitte.com/global/en/pages/about-deloitte/articles/social-progress-helps-attract-foreign-direct-investment.html>], accessed: 24 April 2016.

<sup>4</sup> *Ibidem*.

It is easy to move the border between economic impacts to the social ones. Good consequences for the society are able to come only if exists a sustainable economic development of the foreign investments. These two consequences are in a mutual relation, are influencing each other. No investor will come in a country without a secure work climate and where there are no specific laws created to sustain the investments. But how to attract foreign investors? First of all, by creating a favorable investment climate. By being favorable, a climate investment is characterized by aspects as political stability, favorable laws for investors, young and well prepared workforce.

The benefits of FDI are numerous and in some cases offset the negative impact. FDI inflows can result in technology transfers, human capital formation, international trade integration, an increase in competitive business environments, enterprise development, economic growth, and improved environmental and social conditions (OECD, 2002, p. 1). Regarding the benefits for the society in the host country, it is not always facing a sustainable positive impact because most of the investments are creating positive consequences only for the period of implementation. An example of a positive long term effect is represented by trainings and courses for the employees. This is a spillover effect because the investor is looking to improve the education level of an employee in order to develop a better development of the company. But, if it happens to move the company to another host country, the trained employee remains with no job, but still with the skills obtained in the education process.

One of the most remarkable effects of foreign direct investments on society concerns the quality of the labor conditions. An investment produces positive social consequences if it is capable to create equal work opportunities for men and women, if it is interested to invest in education and new technology in order to sustain the employees, and if is respecting human rights, the environment and the law.

While generally perceived as beneficial for local development of the host country, foreign direct investments has also raised concerns about unfair competition and about the workers' rights. Usually, the foreign investors tend to provide a better pay than their domestic counterparts, and that is due to the fact that wages in developing economies are smaller than in the origin country. This may happen because the productivity advantage of foreign investors spills over to local firms or because the employment activities of foreign owned firms affect the local labour market (Arnal et al., 2008, p. 20).

Looking for a cheaper labour force is one of the most important reasons for which foreign investors are moving part of their businesses in emerging economies. So, the positive impact of better wages is spreading to economy by having more money to spend, but it also has a social impact by rising the high standards of life and the life expectancy, by giving to the employees the opportunity to spend their revenues for traveling, relaxing, cultural events and better medical services. Countries with well paid citizens are also known as one of the biggest economies of the world, where the life expectancy is higher than in countries with small wages. But this is not necessary due to the impact of foreign investors; this is much more the contribution of their national policies. Most of the time, those state actors are the origin countries of the foreign investors. Sometimes, foreign investors may be a way for foreign firms in developed countries to supply markets in developing countries (Arnal et al., 2008, p. 14).

By implementing their goals, foreign investments increase pollution in host countries. The evidence is seen on a global scale in the environmental degradation determined by an accelerated industrialization, necessarily not only to support the society's evolution, but also by the need to feed a higher number of people. On their way of encouraging a business-

friendly environment, investors are transferring a part of their funds to corporate social responsibility (CSR). Being aware about a sustainable society, at a time of persistent crises and environmental challenges, UNCTAD is suggesting that all the investor countries should be ensured that their investment actions are oriented to a long term and socially fair development. A country which is not having strong regulatory systems for the rents of the exploitation of their resources has a small benefit from the foreign investment. In a case like this, the benefits are most often redistributed to less beneficial uses such as funding imports for consumption or investing abroad. When rents are reinvested in efficient enterprises and in long-term productive capital, the benefits of FDI could be achieved in an efficient way for the host country (Mabey & McNalley, 1998, p. 27).

The social impact of foreign investments is also released by the type of investment and cultural rules on the one hand, and also, by the origin of the investor. It is necessary to clarify that in this paper cultural rules are defined as a set of rules provided by foreign company embodied in the structure of the new one, in order to transform it into a specific personality. Cultural values and norms influence attitudes and patterns of behaviour and in this way have an impact on economic activities. Culture acts as a kind of background variable that manifests itself in attitudes and patterns of behaviour, and this is valid not only at individual level, but also at the investor's level. Not only people belong to different groups and cultures, also investments force to a specific culture<sup>5</sup>.

For example, in the first case, the social impact could be seen in the entrepreneurial culture promoted by the investor in the host country, which is requesting that the way of working should be adapted to the policy generated by the foreign company. Culture can influence economic activity in diverse ways: Culture is known to influence attitudes towards work and consumption. Culture has an influence on the organization of economic activity and the shaping and effectiveness of institutions, and culture also has an impact on social networks and confidence building within social groups (Fukuyama 2001, p. 3132). There is no known definition for entrepreneurial culture, but in this study we refer to practices promoted by an investor when we refer to this topic. The consequences can determine two directions: the entrepreneurial culture can be easily accepted and well applied by the employees in the host country, or could face rejection or misunderstanding. In the second case, the mother company faces a crisis and if is not able to fix it, it may be forced to quit the activity in that host country. As a rule, it cannot be scientifically substantiated that programmes launched to enhance "entrepreneurial culture" or to improve foundation on-related attitudes actually lead to more business foundations (Storey 2003, pp. 181-202). So, what matters for a company? In practice, the foreign company is preoccupied to obtain a higher performance for the employees and for itself, but also, to maintain a good working environment. To achieve these goals, the company is investing in human resources by implementing with them various training methods, in order to develop specific skills. Also, if a company wants to survive in a traditional society, it should to adapt its profile to specific requires. It is the case of McDonalds which is not selling products made of cow meat in India.

The origin of the investor could cause social and cultural tension between the home country and the host country, but at the same time, a diplomatic friendship could be an important advantage in the negotiation process. In this case, a good example is the relation between Romania and France, based not only on economic benefits, but also on a

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<sup>5</sup> Organization for Economic Co-operation and Development, *Entrepreneurial culture and attitudes*, available at [<http://www.oecd.org/site/cfecpr/42202841.pdf>], accesed 29 April 2016.



traditional diplomatic relationship, built over time. Also, without a stable political structure, foreign investments could be seen as an extension of imperialism. In more traditional cultures, rapid urbanization is seen as a threat to the local culture, so, an increase in FDI can lead to political conflict in the host country (Rothgeb, 2002, p. 36).

In the last years, the number of foreign investors is increasing in Eastern and Central Europe countries due to the fact that those state actors are trying very hard to adopt their politics, educational programs and infrastructure to the level of democratic countries from the Western Europe. The level of attractiveness of those actors is similar for the entire area. For example, according to *The Global Competitiveness Report 2013-2014*, Romania is situated on the 76 position, which is similar with the neighbourhood countries, and is not really a privileged one for the development of the country. In consequence, without touching a certain level of social development, where the markets are also well developed, a country will not be able to benefit from foreign investments presence, and the positive effects on the economic growth will be also less significant. Foreign investors alone cannot solve the problems of poverty, political instability and underdevelopment; these problems stretch far beyond the limited capacity of corporations. Another example is the experience of countries in East-Asia which shows that developing countries that use FDI purposefully by formulating and implementing national and technological development policies, will be successful in their efforts (Herman et al., 2005). The big challenge for an economy is to realize a strong combination of foreign investors and social policies in order to achieve a reduction of human rights abuses, environmental degradation, cultural tensions and financial volatility.

A lot of new products are entering into the market as a consequence of foreign direct investments. This fact has a powerful social impact because people can enjoy other products, which most of the time are quality goods for the host country, but for the investor, a new market is a new way to extend the business.

Owing to social impact of larger FDI, a country has the opportunity to obtain a better life standard by positive changes made in the educational system. This is possible by creating partnerships between companies and universities from the mother country with those from the host country. Supporting the education, which means accessibility to international programs for students, ending with foreign degrees and certificates, the country's attractiveness for foreign investors will grow due to the larger number of professionals. In consequence, it could stop the brain-drain issue by giving them the opportunity to work on high standards and to live properly with a satisfactory salary. Also, an increased number of educated people and of good working places will contribute to the liberalization of labour in developing country and the wage earnings will certainly be reduced. There is a complex relationship between foreign direct investment and human rights, between the ways in which FDI impacts society both negatively and positively. It is the interaction of governments and foreign companies that will lead to economic growth and social prosperity through FDI (Spar, 1999, p. 55).

Long term benefits to society are not able to develop only by having a high number of foreign investors. In order to provide positive social effects, the host country should ensure about an entire framework composed by legislative, political, social, institutional and even educational aspects, due to the capacity of those elements to influence each other. Recommendations for reforms about their actions are also made to the foreign investors. Such examples include multilateral agreements for corporate conduct, policy frameworks for social and environmental standards, programs for

education and workforce training, and improvement of the internal political climate by the host government (Herman, 2005).

### Conclusion

In the absence of favourable conditions in the host country economy, attracting foreign investors is a more difficult task. Positive effects on the economic and also on the social level are more likely to appear, if the host country promotes a set of rules and reforms designated to protect against the negative ones.

What makes it different from the economic point of view is that social impact can't be empirically verified: culture, education or work satisfaction cannot be measured directly. In economy, foreign direct investments are seen as a driver for development of the host country because it has a lot of positive contributions by bringing advanced technology, capital, know-how and specialists. Moreover, it creates new jobs, with good salaries, and gives access to new markets.

The social impact of foreign investments can vary from country to country due to specific traditions, own social customs, religion, political regime or types of laws. In this regard, it can be higher or not, but it determines major reforms in domestic policies in order to obtain a rapid economic growth and a sustainable social development.

Choosing to invest in a country because of its financial benefits could determine also social progress, but this is a cycle because a good social climate has also the capacity to attract important investments. These two coordinates are in a mutual relation most of the time. The best case scenario is when different elements of social progress evolve at the same time with the economic development, being symbiotic, not conflictual.

In conclusion, the right policies can attract foreign direct investments and in this way social progress can be achieved, which in turn can be used to drive further progress. Combating corruption, improvements in political rights and a fair financial practice, can have a beneficial effect to increase foreign investments and to generate a positive social climate.

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## INTEGRATION OF MINORITIES IN THE EUROPEAN UNION. A COMPARATIVE STUDY REGARDING THE EUROPEAN STRUCTURAL FUNDS FOR MIGRANTS AND MINORITIES DURING 2000-2006 AND 2007-2013

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**Abstract.** *It can be stated that only a reduced proportion of European Structural Funds measures involve specific actions targeted directly at migrants and minorities, which can be quantifiable into clear results. Almost all funding targeted towards them is generated through general measures, in which migrants and minorities are reflected among several disadvantaged groups. The 2000-2006 period had a major impact on the EU Member States vision towards migrants and minorities integration, fact that was reflected in the 2007-2013 period.*

**Keywords:** *integration, migration, minorities, Member States, structural funds*

European Union and integration in the European Community developed itself on three basic ways, creation of a common market, development of common institutions and several common policies. Market integration has progressed a long way, although it stops and restarts again. The institutional integration is left behind, but the most difficult of all is represented by the common policies, especially where they have required founding.

With the reform of the Structural Funds, regions have gained a key role in the design and implementation of regional policy. Yet some of the weakest regions were not equipped with appropriate institutional structures and have struggled to benefit (Polgár, 2016:525).

As globalization reaches more and more places, international migration is starting to be at the centre of attention.

Cultural mixes are not only today's accomplishment due to an apparent melting pot or due to globalizing tendencies. Different cultures have coexisted for centuries in local communities, especially in smaller melting pots, such as Europe's greatest empires, such as the Austrian Empire, later the Austro-Hungarian Empire, or the Russian Empire. Due to their vast territories, different populations were either moved from one part of the empire to another, or they simply migrated to different locations. This enabled a meeting of cultures, civilizations and helped created new forms of cohabitation between the majority and the minorities (Mărcuț, 2016, 47).

Nowadays, international labour mobility in the European Union is treated like a normal phenomenon, but it is viewed with rather negative than positive impact on the

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economies of Member States, because of the dilemma of implementing appropriate policies for the integration of migrants in the labour market. One of the top questions is: “how to prepare migrants to feel at home and make them and the human capital they carry from their countries of origin an integral and productive part of the host communities?” (Glystos, Bruno, 2010:3). It has been observed and it was generally accepted that even when employed, if economies slow down, minority unemployment rates will often increase more than average.

It can be stated that both migrants and minorities make a considerable contribution to the economy and the social cohesion of the EU Member States. Normally, this should result in a reduction of poverty and unemployment and an improvement of their social inclusion. Therefore EU integration policies should contribute towards eliminating these obstacles and promoting the social inclusion of migrants and minorities.

The paper aim is to retrieve the 2000-2006 and 2007-2013 programming periods in terms of allocated funds from the European Social Fund measures to support access to the labour market and the social inclusion of migrants and minorities.

Funding for migrants and minorities varied considerably among the EU Member States. Targeting strategies also differed with a distinction between: “specific actions in which migrants and minorities alone were targeted; an ‘explicit but not exclusive’ targeting approach in which they were the main but not the only group targeted; a mainstreaming approach (i.e. horizontal measures); and, general European Social Fund measures in which they were among a series of disadvantaged groups targeted”<sup>1</sup>.

Some EU countries have placed a greater focus on NGOs as delivery organisations responsible for implementing ESF interventions targeted at migrants and minorities, others have relied on public employment services and local or regional state institutions.

### Definitions

There is a different perception between countries with regard to the definitions of the terms: migrant, national minority and ethnic minority. In some cases, EU Member States are treating migrants and minorities like own citizens, in other cases like non-citizens - their migration or minority background is viewed as irrelevant<sup>2</sup> in statistical terms. There are also differences in the way these people are viewed as having an ethnic minority background irrespective of how long they have been in that country. Consequently, a flexible definition was therefore adopted by the European Commission:

- “Migrants –non-EU born individuals from a third country legally-residing in EU27. Migrants can be of first, second or third generation;
- Ethnic Minority – individuals with a different cultural tradition or background from the majority of the population;
- National Minority – individuals from relatively well-established minority groups living in particular EU countries;
- Indigenous minorities - ethnic groups, long-standing residents of a EU country”<sup>3</sup>.

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<sup>1</sup> Centre for Strategy & Evaluation Services, *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 40. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in July 2016)

<sup>2</sup> Ibidem, 12.

<sup>3</sup> Ibidem.

### Legal considerations

European Commission migration, integration and immigration policies are in charge of Directorate General Migration and Home Affairs. These policies were established by the Treaty of Amsterdam<sup>4</sup>, entered into force in 1999. Basic principles like setting an EU policy framework for the integration of third-country nationals were then adopted in 2004 through the Hague Programme<sup>5</sup>. Further development of integration policies was done by choosing 2 of the 11 Common Basic Principles as relevant to migrants from third countries, “CBP 3 (Migration Management) and CBP 6 (Integration: The Positive Impact of Migration on our Society and Economy)”<sup>6</sup>.

In order to materialize the engagements made in the Common Agenda for Integration, the Commission has created the National Contact Points on Integration<sup>7</sup> for fostering exchange of information and good practices between Member States. “Handbooks on integration for policy-makers and practitioners”<sup>8</sup> were published in 2004, 2007 and 2010, respectively. A specific legal basis for integration was provided by the Lisbon Treaty, allowing the EU to further develop the Stockholm Programme<sup>9</sup>.

Other specific initiatives were determined by the necessity to reveal data concerning migrants and minorities, one of the most representative publications being the special Eurobarometer surveys<sup>10</sup> on experiences of discrimination. The EU-MIDIS<sup>11</sup> (EU Minorities and Discrimination Survey) was the first EU-wide survey of immigrant and ethnic minority groups' experiences of discrimination and victimisation in everyday life.

### Causes and effects

Demographic aspects demonstrated that not only does the EU have a “rapidly ageing population, with relatively low birth rates, but there are increasing net migration flows into the EU”<sup>12</sup>. There has been a significant rise in the proportion of people with an immigrant background and ethnic minorities in the EU over the last decade.

<sup>4</sup> *Treaty of Amsterdam*, (1997) <http://www.eurotreaties.com/amsterdamtreaty.pdf> <http://ec.europa.eu/esf/main.jsp?catId=46&langId=ro&list=0> (accessed in september 2016).

<sup>5</sup> Council of the European Union, *Document 16054/04*, (Brussels, 2004). [http://ec.europa.eu/home-affairs/doc\\_centre/docs/hague\\_programme\\_en.pdf](http://ec.europa.eu/home-affairs/doc_centre/docs/hague_programme_en.pdf) (accessed in july 2016)

<sup>6</sup> Centre for Strategy & Evaluation Services, 19. *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

<sup>7</sup> Commission of the European Communities, *Document COM/2005/0389 final*, (Brussels, 2005), <http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:52005DC0389> (accessed in july 2016)

<sup>8</sup> Centre for Strategy & Evaluation Services, 19, *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

<sup>9</sup> Council of the European Union, *Document 16484/09*, (Brussels, 2009). <http://www.statewatch.org/news/2009/nov/eu-draft-stockholm-programme-23-11-09-16484-09.pdf> (accessed in september 2016).

<sup>10</sup> European Commission, *Special Eurobarometer 263: Discrimination in the European Union*, (2007), [http://ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_263\\_en.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_263_en.pdf) (accessed in september 2016).

<sup>11</sup> European Union Agency for Fundamental Rights, *EU-Midis Annual Report*, (2010). [http://fra.europa.eu/sites/default/files/fra\\_uploads/664-eumidis\\_mainreport\\_conference-edition\\_en.pdf](http://fra.europa.eu/sites/default/files/fra_uploads/664-eumidis_mainreport_conference-edition_en.pdf) (accessed in august 2016).

<sup>12</sup> Centre for Strategy & Evaluation Services, 6. *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 40. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

It can be stated that the majority of migrants or minorities could deal with one or more of the following causes when living in an EU Member State, different of the country of origin: “lack of education and training; lack of language skills; lack of recognition of skills and qualifications; lack of access to professions; lack of access to citizenship; lack of integration policies; stereotypes, prejudices and negative attitudes; lack of mobility and concentration in certain areas; industrial change; disincentives through welfare systems; discrimination; lack of information; labour market competition; undeclared work” (Zimmermann, DeVoretz, Kahanec, Gataullina, Anzelika Zaiceva, 2008:35)

While the situation varies across the EU and between different groups, it can be generalised that people from a migrant and minority background (including those of second and third generation) commonly have higher than average unemployment levels, lower participation rates and are at greater risk of social exclusion.

### **European Funds for migrants and minorities during 2000-2006 and 2007-2013**

The European Social Fund is devoted to promoting employment and social inclusion in the EU. It co-finance interventions supported by national public and private funds. The ESF strategy and budget is negotiated and decided between the EU Member States represented in the Council of the European Union, the European Parliament and the Commission. On this basis, seven-year Operational Programmes (OPs) are planned by Member States and approved by the European Commission.

The ESF is one of the EU Structural Funds spending in 2007-2013 amounts to around 10% of the EU's total budget (around €75 billion)<sup>13</sup>. The ESF's wider aims are to address the specific needs of individuals from groups at disadvantage in the labour market, which include people with a migration or minority background. As well as internal barriers (specific to individuals themselves), the ESF also seeks to tackle some external barriers (such as combating discrimination and improving the recognition of qualifications from third countries).

#### **1. European Social Fund 2000-2006**

In the 2000-2006 period, the focus was on contributing to the achievement of the Lisbon Strategy aim of “more and better jobs”. Across the 14 countries, according to the table below, €26bn was estimated to have been spent on measures in which migrants and minorities were among the beneficiaries. However, this data relates to total expenditure in which migrants and minorities are among a number of disadvantaged targeted groups. During 2000-2006, the ESF reporting methodology for EU countries was also weak.

The table shows that 200 out of a total of 1180 measures were targeted at migrants and minorities across ESF Operational Programmes in 14 EU countries. Spain (78.7%), Sweden (33.6%) and the UK (74.3%) accounted for a relatively high proportion of ESF expenditure that benefited migrants and minorities (among other disadvantaged groups). Among other factors, different definitions of target groups (either as migrants or minorities) helps to explain wide variations in total expenditure on measures in which these groups were covered. At the other end of list, only a small proportion of expenditure on these groups was identified in Austria (0.5%), Greece (1.5%), Lithuania (0.7%).

<sup>13</sup> Centre for Strategy & Evaluation Services, 6. *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 34. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in July 2016)



**Table no. 1.** Statistics on ESF 2000-2006 regarding migrants and minorities

Member State	No. of measures addressing migrants & minorities / total no. of measures	Share of measures addressing migrants and minorities (in %)	Share of budget for measures in which migrants and minorities are targeted (in %)	Amount of ESF / national/private funds dedicated to measures where migrants and minorities are targeted (in €)	Total budget of ESF OPs concerned (ESF/national/private) (in €)
Austria	2 / 23	8.7%	0.5%	140 373 922	1 437 531 141
Finland	7 / 29	24.1%	13.4%	328 044 100	2 453 545 398
France	5 / 146	3.4%	11.6%	1 588 462 383	13 626 924 243
Germany	26 / 116	22.4%	2.8%	580 780 100	20 459 435 565
Greece	8 / 111	7.2%	1.5%	90 538 370	6 058 986 085
Hungary	4 / 15	26.7%	12.8%	67 486 475	527 706 416
Italy	38 / 320	11.9%	20.5%	3 185 391 195	15 489 142 851
Lithuania	1 / 5	20%	0.7%	1 500 000	217 053 681
Netherlands	4 / 15	26.7%	2.2%	67 970 000	3 105 527 688
Poland	1 / 16	6.2%	4%	100 400 000	2 515 214 425
Slovakia	1 / 12	8.3%	-	-	505 745 610
Spain	99 / 347	28.5%	78.7%	18 963 639 963	14 936 369 618
Sweden	5 / 25	20%	33.6%	900 674 008	2 680 370 293
UK	31 / 126	24.6%	74.3%	11 776 576 222	15 845 244 504
Total	201 / 1180	17%	31%	26 015 260 516	84 013 553 014

*Source:* Centre for Strategy & Evaluation Services, 47.

## 2. EQUAL Community Initiative Programme 2000-2006

“The EQUAL Community Initiative Programme 2000-2006 was financed through the ESF and had a budget of €3.2 bn. It was implemented over two Rounds of calls for proposals. National co-funding of over €2.2bn was provided by the Member States meaning that total EQUAL expenditure was €5.4bn. In total, more than 3.300 Development Partnerships were funded in 27 Member States. Migrants and minorities were among the disadvantaged target groups addressed”<sup>14</sup>.

A key aim of EQUAL was to promote new means of combating discrimination and inequalities in the labour market, both for those already in employment and those seeking work. EQUAL served as an laboratory to develop and disseminate new ways of delivering employment policies with a focus on integrating disadvantaged groups. The aim was to mainstream new approaches into core ESF programmes in 2007-2013. The Programme was designed to be complementary to the ESF.

EQUAL was implemented by the Member States on the basis of Community Initiative Programme documents (CIPs) drawn up by EQUAL Managing Authorities. Development Partnerships (DPs)<sup>15</sup>, established at geographical or sectoral level were comprised of a number of organisational partners working together to develop approaches to promoting equal opportunities for all in accessing the labour market. DPs were engaged

<sup>14</sup> Centre for Strategy & Evaluation Services, 6. *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 10. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

<sup>15</sup> Centre for Strategy & Evaluation Services, 6. *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 11. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

in transnational co-operation and also participated in the dissemination and mainstreaming of good practices. It was compulsory to involve NGOs in EQUAL, therefore, there was considerable involvement of migrants and minority NGOs, as well as other social NGOs, community and voluntary organizations.

**Table no. 2.** Statistics on EQUAL 2000-2006

Member State	Total budget (in €)	Combating racial discrimination (Theme B) (in €)	Equal opportunities (Theme H; incl. gender equality) (in €)	Asylum seekers (Theme I) (in €)	Total amount (Themes B+H+I) (in €)
Austria	103 801 243	20625000 (19.8%)	12721000 (12.3%)	6554000 (6.3%)	39900000 (38.4%)
Finland	73 576 763	8150000 (11%)	7357082 (10%)	1472016 (2%)	16979098 (23.1%)
France	310 643 235	34250300 (11%)	35343369 (11.4%)	6425110 (2.1%)	76018779 (24.5%)
Germany	523 585 685	54400750 (10.3%)	51450000 (9.8%)	29640000 (5.7%)	135490750 (25.9%)
Greece	105 938 327	11250000 (10.6%)	10410000 (9.8%)	3082000 (2.9%)	24742000 (23.4%)
Hungary	30 292 135	0.0	2423371 (8%)	908764 (3%)	3332135 (11%)
Italy	401 364 808	27750000 (6.9%)	40136480 (10%)	12040944 (3%)	79927424 (19.9%)
Lithuania	11 866 395	0.0	2373279 (20%)	355991 (3%)	2729270 (23%)
Netherlands	195 032 684	8750654 (4.4%)	32356287 (16.6%)	9122445 (4.7%)	50229386 (25.8%)
Poland	133 938 206	0.0	12054438 (9%)	2276949 (1.7%)	14331387 (10.7%)
Slovakia	22 266 351	4820750 (21.6%)	2671963 (12%)	667991 (3%)	8160704 (36.7%)
Spain	524 501 577	46650000 (8.9%)	163360500 (31.1%)	6940356 (1.3%)	216950856 (41.4%)
Sweden	87 722 227	0.0	8180255 (9.3%)	4751664 (5.4%)	12931919 (14.7%)
UK	406 656 637	30875000 (7.6%)	23479010 (5.8%)	19738010 (4.8%)	74092020 (18.2%)
<b>Total</b>	<b>2 931 186 273</b>	<b>247 552 454 (8.4%)</b>	<b>404 317 034 (13.8%)</b>	<b>103 976 240 (3.4%)</b>	<b>755 845 728 (25.8%)</b>

Source: Centre for Strategy & Evaluation Services, 52.

In Italy, 19.9% of EQUAL funds were devoted to Themes B, H and I, whereas in Spain, 41.3% of funds were devoted to these same themes. Since the combating of racial discrimination was a key thematic priority in EQUAL, Theme B provide a good chance for funding dedicated to improving the labour market and social inclusion of migrants and minorities. Some EQUAL programmes included the optional thematic priority on refugees and asylum-seekers, for which it was spent from 2% to 6% of EQUAL funds.

### European Social Fund 2007-2013

The ESF Regulations 2007-2013 explicitly mentioned for the first time the role of the ESF in integrating migrants and minorities in the labour market in promoting their social inclusion. Paragraph 1b of Article 3 identifies enhancing access to employment as a priority, referring to the importance of “specific actions to increase migrants’ participation in employment”<sup>16</sup>, while Paragraph 1c refers to the “need to reinforce social inclusion of disadvantaged people by promoting pathways for integration and re-entry into employment for – among other groups – minorities”<sup>17</sup>.

Furthermore, Article 10 requires ESF Managing Authorities<sup>18</sup> to provide monitoring information in annual and final implementation reports regarding actions to increase participation rates among of migrants.

A new system for codifying<sup>19</sup> ESF expenditure was introduced through the ESF Regulations in the 2007-2013 period, which sets out a number of priority themes on which the Member States should report on ESF expenditure disaggregated by target group. The

<sup>16</sup> *Ibidem.*, 10.

<sup>17</sup> *Ibidem.*

<sup>18</sup> *Ibidem.*

<sup>19</sup> *Ibidem.*, 53.

ESF monitoring and information system has been organised into 86 different expenditure categories<sup>20</sup> at Priority level in national and regional ESF programmes. Relevant codes relating to migrants and minorities are:

- Code 70: “Specific actions to increase migrants’ participation in employment and thereby strengthen their social integration;
- Code 71: Pathways to integration and re-entry into employment for disadvantaged people; combating discrimination in accessing and progressing in the labour market and promoting acceptance of diversity in the workplace”<sup>21</sup>.

**Table no. 3.** Statistics on ESF 2007-2013 regarding migrants and minorities

Member State	No. of priority axes supporting migrants and minorities/total no. of priority axes	Budget dedicated to targeting migrants and minorities (in € m)	Total budget (in € m)	Share of budget for migrants & minorities/ total budget
Austria	2/10	€398,000,000	€1,184,000,000	33.6%
Finland	3/7	€472,000,000	€1,420,000,000	33.2%
France	4/21	€2,679,000,000	€10,275,000,000	26.1%
Germany	33/84	€8,737,000,000	€15,666,000,000	55.8%
Greece	4/47	€582,000,000	€5,726,000,000	10.2%
Hungary	4/14	€2,561,000,000	€4,270,000,000	60.0%
Italy	50/146	€9,013,000,000	€15,321,000,000	58.8%
Lithuania	0	0	€1,210,000,000	0.0%
Netherlands	1/4	€790,000,000	€1,705,000,000	46.3%
Poland	2/10	€2,059,000,000	€11,420,000,000	18.0%
Romania	6/10	€3,926,000,000	€4,335,000,000	90.6%
Slovakia	2/10	€297,000,000	€1,764,000,000	16.8%
Spain	27/123	€5,035,000,000	€11,426,000,000	44.1%
Sweden	1/3	€929,000,000	€1,383,000,000	67.2%
UK	12/25	€7,684,000,000	€8,598,000,000	89.4%
<b>Total</b>	<b>151/514</b>	<b>€45,162,000,000</b>	<b>€95,703,000,000</b>	<b>47.2%</b>

**Source:** Centre for Strategy & Evaluation Services, 53.

The study *An Overview of ESF Interventions* (Ecotec) found that “across EU27, €1.17bn of EU funding has been allocated under Priority Theme 70 (migrants) and an additional €10bn of funding allocation under Priority Theme 71 (disadvantaged people, including migrants and minorities)”<sup>22</sup>. Of this financial allocations, about half (€5bn) appears to have been targeted at migrants and minorities through broader measures.

### 3. European Fund for Integration of Third-country Nationals 2007-2013

The European Integration Fund 2007-2013 was complementary to the European Social Fund (ESF) 2007-2013, for actions related to the participation of migrants in employment. Concretely, such initiatives included programmes for improving diversity management in neighbourhoods, intercultural training and dialogue, the promotion of courses for better understanding the integration processes, platforms and tools for comparative learning, measures for sharing information and best practices among European integration practitioners (e.g. online discussion forums, conferences, etc.) and

<sup>20</sup> *Ibidem.*

<sup>21</sup> *Ibidem.*

<sup>22</sup> *Ibidem.*, 53.

activities in the hosting EU State and in the immigrant's country of origin on introduction to the host society.

With a budget of EUR 825 million<sup>23</sup> for the period 2007-13 (EUR 57 million for Community actions), the EIF supported national and EU initiatives that facilitated the integration of non-EU immigrants. The EIF was primarily targeted at newly arrived immigrants and all EU countries except for Denmark participated. It had 3 priority axes: “(1<sup>st</sup>) Gather public and migrant perceptions and develop a more comprehensive understanding of the integration processes; (2<sup>nd</sup>) Promote integration measures targeting young population and addressing specific gender issues; (3<sup>rd</sup>) Promote the role of civil society organisations and the local authorities in shaping integration strategies”<sup>24</sup>.

### **Other EU funds supporting migrants and minorities**

There are a number of EU programmes that complement the ESF and also help to promote the social and economic integration of migrants and minorities. These include:

- “Community Action Programme to Combat Discrimination 2000-2006 and the Progress Programme 2007-2013 (DG EMPL);
- European Regional Development Fund 2000-2006 and 2007-2013 (DG REGIO);
- The URBAN Community Initiative Programme 2000-2006 and the URBACT programme 2007-2013 (DG REGIO);
- The European Integration Fund 2007-2013 (DG HOME) and the European Refugee Fund 2000-2004, 2005-2007, 2007-2013 (DG HOME);
- Life Long Learning Programme 2007-2013 (the Grundtvig, Comenius and Leonardo programmes are especially relevant (DG EAC)”<sup>25</sup>;
- “External Borders Fund 2007-2013 and European Return Fund 2008-2013”<sup>26</sup>

Like the European Integration Fund (EIF), the European Refugee Fund (ERF) is intended to finance actions targeted at third-country nationals. The personal scope differs from that of the EIF, however, as the ERF supports actions towards “persons with the status of refugee or persons benefiting from another form of international protection, displaced persons benefiting from temporary protection and (depending on the nature of the measures) persons applying for such status or protection”<sup>27</sup>.

### **Assessing EU migration and minorities funds: difficulties and realities**

The legal status of the migrant is the decisive factor for determining which financial framework may be used for supporting national measures. In many cases, it was found

<sup>23</sup> [http://ec.europa.eu/dgs/home-affairs/financing/fundings/migration-asylum-borders/integration-fund/index\\_en.htm](http://ec.europa.eu/dgs/home-affairs/financing/fundings/migration-asylum-borders/integration-fund/index_en.htm) (accessed in august 2016)

<sup>24</sup> European Commission, *European Fund for the Integration of Third-country Nationals 2007-2013, Community Actions - Call for proposals*, 2009, [http://ec.europa.eu/home-affairs/funding/integration/call\\_10172/call\\_proposals\\_2009\\_en.pdf](http://ec.europa.eu/home-affairs/funding/integration/call_10172/call_proposals_2009_en.pdf) 3-5. (accessed in august 2016)

<sup>25</sup> Centre for Strategy & Evaluation Services, 6. *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 179. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

<sup>26</sup> European Court of Auditors, *Do the European Integration Fund and the European Refugee Fund contribute effectively to the integration of third-country nationals?*, 2012, 11, <http://bookshop.europa.eu/en/do-the-european-integration-fund-and-european-refugee-fund-contribute-effectively-to-the-integration-of-third-country-nationals--pbQJAB12022/>, (accessed in august 2016)

<sup>27</sup> *Ibidem.*, 13.

that “EIF support for employment activities were not complementary to ESF-funded actions, as they were rather directly”<sup>28</sup> assisting their search for work. Although the Commission’s ex ante<sup>29</sup> assessment identified the ESF as comprising relevant actions, the full extent of the overlap with EIF remained unknown. There are no specific data available to judge the extent to which the ESF supported the integration of third-country nationals.

Table no. 4 shows the situation of foreign residents of EU member states in 2010, in order to better understand the purposes of the above funds.

**Table no. 4.** Foreign residents of the European Union, 2010

Foreign residents of EU Member States: <b>32.5 million</b>		
Third country nationals: <b>20.2 million</b>		EU nationals living in another Member State <b>12.3 million</b>
EU Integration Fund target group: <i>Economic, study and research migrants</i> <b>18.6 million</b>	EU Refugee Fund target group: <i>Refugees, subsidiary and temporary protection</i> <b>1.8 million</b>	
	<i>Asylum seekers</i> <b>0.3 million</b>	

**Source:** Own representation based on European Court of Auditors, 15.

The Commission estimated that during 2007–2013, 1,17 billion euro<sup>30</sup> from the ESF was budgeted for increasing migrants participation in employment. The ESF also financed social inclusion measures which supported the integration of migrants so at least part of the 9,5 billion euro budgeted for this is relevant for integration of third-country nationals (Table no. 3). The ESF’s financing of integration-related issues was therefore larger than “the EIF (830 million euro for 2007–13) and the ERF (623 million euro for 2008–13)”<sup>31</sup>.

### **Examples of indicators used to audit ESF, EIF, ERF Programmes**

Due to these weaknesses in programming and reporting at national level, no clear assessment of results can be performed. Results can only be established at project level, and even then, only where clear targets and indicators have been set. Such indicators are revealed in Table no. 5.

**Table no. 5.** Examples of indicators

<b>Good example 1</b>	<b>Good example 2</b>	<b>Poor example 1</b>
<b>Measurable output indicator with target value and reference to the current situation</b>	<b>Measurable outcome indicators related to the above measure</b>	<b>Two output indicators which are not clearly defined, potentially overlapping and not measurable</b>
<b>Objective of the measure:</b> Development and organisation of educational activities targeted to third-country nationals (language	<b>Outcome Indicator:</b> Number of third-country nationals satisfied with the	<b>Objective of the measure:</b> Creation of meeting places between immigrants and host society (intercultural exchanges,

<sup>28</sup> European Court of Auditors, *Do the European Integration Fund and the European Refugee Fund contribute effectively to the integration of third-country nationals?*, 2012, 24, <http://bookshop.europa.eu/en/do-the-european-integration-fund-and-european-refugee-fund-contribute-effectively-to-the-integration-of-third-country-nationals--pbQJAB12022/>, (accessed in august 2016)

<sup>29</sup> Centre for Strategy & Evaluation Services, *Evaluation of ESF Support for Enhancing Access to the Labour Market and the Social Inclusion of Migrants and Ethnic Minorities*, (Belgium, 2011), 32. <http://ec.europa.eu/social/BlobServlet?docId=7106&langId=en>, (accessed in july 2016)

<sup>30</sup> *Ibidem*.

<sup>31</sup> *Ibidem*.

courses, civic courses ...). <b>Output indicator:</b> Number and categories of third-country nationals participating. <b>Target:</b> 300 third-country national participants (total 2007–13). <b>Baseline situation:</b> No pre-existing courses.	activities. Number of third-country nationals successfully completing the activities.	awareness-raising activities). <b>Output indicator:</b> Number and type of subjects discussed classified as ‘subjects more superficial’ versus ‘subjects more personal’. <b>Output indicator:</b> Number and classification of participants: ‘parents and children’, ‘youth and children’.
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**Source:** Own representation based on European Court of Auditors, 21.

### Examples of positive projects

“The Luxembourg EIF supported the project ‘Partnerships for intercultural integration: Setting up of Information and orientation services’. The project was carried out by the Association for Support to Immigrant Workers and aimed to giving equal access to information concerning the rights and obligations of citizens. Activities included the establishment of a partnership with different associations, the development of a website and an interpretation service. The co-financing by the EIF was 112 000 euro (50% co-financing rate) from the 2009 Annual Programme”<sup>32</sup>.

“In Germany, the ERF supported the project ‘... Are you in? Refugees as part of society — on the way to a self-determined life’. The three-year project, carried out by the Caritas, Archdiocese of Berlin, was supported in its first year by 42 509 euro from the ERF Annual Programme 2009 (50% co-financing rate). It aimed to improve reception conditions for asylum seekers/refugees and strengthen services and structures in Eastern Brandenburg. A total of 683 people participated in the project’s activities such as German courses or intercultural staff training”<sup>33</sup>.

### Examples of failed projects

“In the United Kingdom, the ERF supported a project which did not succeed. The Merseyside Fire and Rescue Service made an innovative application to address the high fire-risks identified in the refugee population, by way of home checks (800 dwellings), work placements in the fire service, website development, leaflets in over 30 languages and the education of landlords. The project’s first year was to be supported by an ERF grant of 21 325 euro. The target of 800 home checks turned out to be unrealistic as the underlying refugee population was much smaller than had been assumed and the addresses of the target population could not be obtained. As a result, only 60 home checks were funded and the project was abandoned after its first year”<sup>34</sup>.

<sup>32</sup> European Court of Auditors, *Do the European Integration Fund and the European Refugee Fund contribute effectively to the integration of third-country nationals?*, 2012, 26, <http://bookshop.europa.eu/en/do-the-european-integration-fund-and-european-refugee-fund-contribute-effectively-to-the-integration-of-third-country-nationals--pbQJAB12022/>, (accessed in august 2016)

<sup>33</sup> *Ibidem.*, 26.

<sup>34</sup> *Ibidem.*, 27.

### Member States feedback

Most Member States perceived the EIF as providing ‘value-added’<sup>35</sup> despite the difficulties in implementation. Where Member States had a less developed integration policy framework, the Fund filled the gap in national resources or provided the opportunity to expand support to specific target groups.

While some member states have chosen to promote long-lasting activities, others have favoured short, one-off initiatives. Certain applicants applied for funding over a period of two or three years (Carrera, Atger Anais, 2011:39), while the responsible authority may provide a follow-up grant to projects that have been evaluated as successful.

For the Member States authorities and final beneficiaries, the separation between European Social Fund and European Integration Fund caused an additional bureaucratic burden, in particular, because these funds had different administrative structures.

### Conclusions

The issue of national minorities is, in the process of European construction, one of the most important aspects that European countries have had to manage. Learning about and researching minorities, for then to transmit knowledge and experience to young people through education, have become an essential pillar of European values on the construction of an intercultural society based on direct and indiscriminate cooperation and collaboration between ethno-religious communities (Brie, 2017:17).

One of the EU’s distinctive contributions to the conceptualisation of the integration of third-country nationals during the last 25 years has been an emphasis on the need to overcome past acculturation and assimilation discourses, and policies exclusively concerned with the obligation of third country nationals to integrate into the perceived ‘host society’s values, principles and way of life’ (Carrera, Atger Anais, 2011:55).

The amount of EU funds allocated for people with a migrant and minority background in 2007-2013 appears likely to significantly exceed that of 2000-2006. This is perhaps not surprising given improved reporting and an evolution in the demographic situation within the EU – in particular an increase in migration from third countries.

EQUAL in particular played a valuable role in encouraging the development of a wider partnership based approach so as to ensure a holistic approach to tackling the problems faced by migrants and minorities in accessing the labour market. This also promoted good governance, since commonly, a very wide range of relevant stakeholder organisations were involved in the activities supported through EQUAL partnerships.

However, in 2012, the European Court of Auditors has found that it is impossible to assess the efficiency of European funds for the integration of migrants and refugees. It was pointed “the absence of proper targets or indicators for annual programmes, grounded in the lack of ex-ante assessment and stakeholder consultation on integration”<sup>36</sup>. Despite the positive feedback of Member States, the Court noted that “there is no direct link between the fulfilment of individual projects and the attainment of overall success”<sup>37</sup>.

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<sup>35</sup> *Ibidem*.

<sup>36</sup> European Court of Auditors, *Do the European Integration Fund and the European Refugee Fund contribute effectively to the integration of third-country nationals?*, 2012, 23, <http://bookshop.europa.eu/en/do-the-european-integration-fund-and-european-refugee-fund-contribute-effectively-to-the-integration-of-third-country-nationals--pbQJAB12022/>, (accessed in august 2016)

<sup>37</sup> *Ibidem*.

While integration policy remains a national competence, the Member States recognise that the ‘failure of an individual Member State to develop and implement a successful integration policy can have in different ways adverse implications for other Member States and the European Union’<sup>38</sup>. In addition, successful integration is seen as crucial for economic and social cohesion in the European Union.

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<sup>38</sup> *Ibidem.*, 10.



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## **IV. Event**

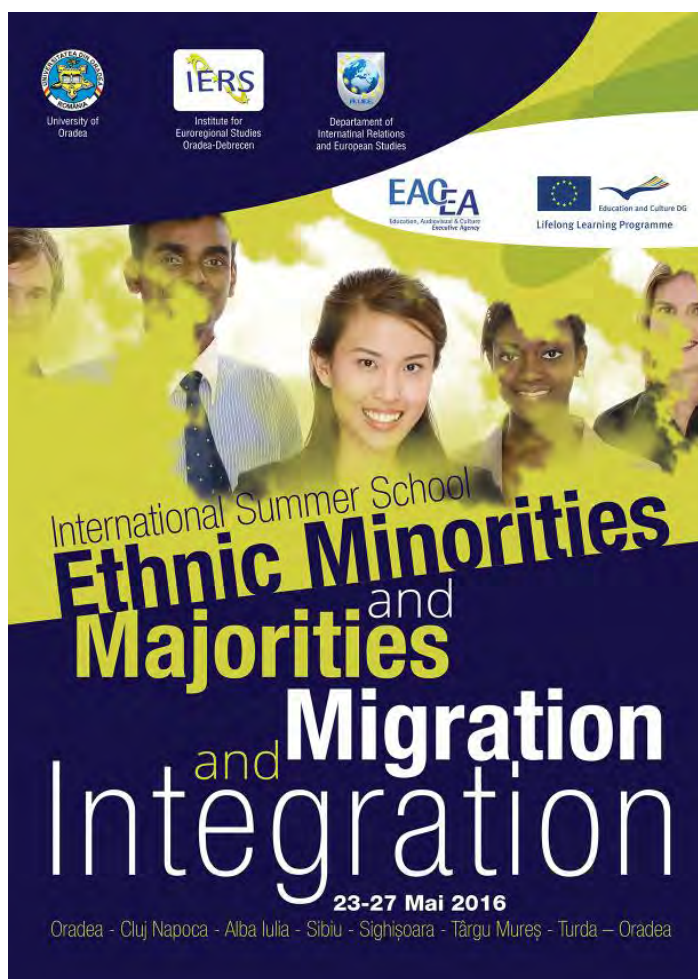


## ***Migration and European Integration of Minorities at the Eastern Border of the European Union***, International Summer School

In the framework of the Jean Monnet Module “*Migration and European Integration of Minorities at the Eastern Border of the European Union*” a Summer School was organised in the period of 23rd – 27th of May 2016, entitled “Ethnic Minorities and Majorities – Migration and Integration”.

During the Summer School the participants traveled and attended courses related to the relation between minority and majority and the integration of traditional minorities. The Summer School had the following route: Oradea – Alesd – Huedin – Cluj Napoca – Turda – Aiud – Alba Iulia – Sibiu – Medias – Sighisoara – Targu Mures – Ludus – Campia Turzii – Turda – Cluj Napoca.

The courses were held by the members of the above mentioned Jean Monnet Module and specialist in the field of ethnicity and integration from the local communities.





## **V. Honoured Personality**





**IN HONOREM PROFESSOR IOAN HORGA, CELEBRATING  
60 YEARS**





# IOAN HORGA – VISIONARY, PROFESSOR AND RESEARCHER BY VOCATION<sup>1</sup>

*Florentina CHIRODEA\**

Ioan Horga was born sixty years ago, on an April day, in Țara Moșilor Region, on the middle course of Arieș River, in a village scattered on the slopes of the Apuseni Mountains<sup>2</sup>. His education started in his native village. After completing secondary school in 1971, he continued his studies at "Horea, Cloșca and Crișan" High School, in Abrud. Starting with 1976, he became student at one of the oldest faculties of "Babes - Bolyai" University in Cluj-Napoca, that of History - Philosophy<sup>3</sup>, a "peak institution in relation to similar faculties in the country"<sup>4</sup>. Despite the "gradual restrictions of activity, restructuring, internal merging" and "the chronic underfunding"<sup>5</sup> that defined the second half of the 70s, the Historical Schools<sup>6</sup>, founded in Cluj Napoca by Constantin Daicoviciu,

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<sup>1</sup> This paper was published in Mircea Brie, Alina Stoica, Florentina Chirodea (coord.), *The European Space Borders and Issues. In Honorem Professor Ioan Horga*, Editura Universității din Oradea/Debreceen University Press, Oradea/Debreceen, 2016, p.15-40.

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<sup>2</sup> Mușca settlement residents were confirmed as presence ever since the 'primitive commune'. Later sporadic archaeological discoveries and numerous documents testify to the continuity of the ancient village community from the period of the Roman occupation until today. Currently, the village belongs administratively to Lupșa, best known for its tourist attractions, among which one can mention: the Ethnographic and Folk Art Museum, founded by Professor Pamfil Albu opened in 1939 and housed in a building dating from 1800 (the museum houses over 6000 exhibits from Țara Moșilor ethnographic region, including a valuable collection of icons on glass and wood from the 18th and the 19th centuries); the Orthodox wooden church in the village of Valea Lupsii (dating from 1429, restored in 1694 and plastered in 1865); Lupșa monastery; the church from Hădărău village (1770). The census of 2011 registered only 531 inhabitants. See *The history of Lupșa village* available at [http://www.primarialupsa.ro/lupsa\\_istoricul-localitatii-109.html](http://www.primarialupsa.ro/lupsa_istoricul-localitatii-109.html), accessed on November 28<sup>th</sup>, 2016; Dan Ghinea, *Enciclopedia geografică a României*, Encyclopedic Publishing House, Bucharest, 2000, available at [http://enciclopediaromaniei.ro/wiki/Lupsa\\_Commune](http://enciclopediaromaniei.ro/wiki/Lupsa_Commune), accessed on November 28<sup>th</sup>, 2016; *Geamăna, un sat din Munții Apuseni*, available at <http://www.vacantesicalatorii.ro/modules/revista/articole/articol.php?artID=2182>, accessed on November 28<sup>th</sup>, 2016; Alba Regional Statistics Department, *Tables of the Population and Housing Census - 2011. The Rural Population of Alba County at the census from 2011*, available at [http://www.alba.insse.ro/cmsalba/rw/pages/rezultate\\_rpl.ro.do](http://www.alba.insse.ro/cmsalba/rw/pages/rezultate_rpl.ro.do), accessed on November 28<sup>th</sup>, 2016

<sup>3</sup> The history of the Faculty of History – Philosophy, "Babeș-Bolyai" University Cluj-Napoca, available at <http://www.ubbcluj.ro/ro/despre/prezentare/istoric>, accessed on November 28<sup>th</sup>, 2016

<sup>4</sup> Vasile Vese, „Universitatea „Babeș-Bolyai” în perioada regimului comunist 1959 – 1989”, in Ovidiu Ghita (coord.), *Istoria Universității „Babeș-Bolyai”*, Mega Publishing House, Cluj-Napoca, 2012, p. 281

<sup>5</sup> *Ibidem*, p. 285

<sup>6</sup> The term is used by professor Vasile Vese in a chapter dedicated to the History of „Babeș-Bolyai” University during the period of the Communist regime (1959-1989) in order to characterize the teaching and research activity performed from the initiative or with the contribution of distinguished specialists from Cluj.

Stefan Pascu, Zsigmond Jakó, Virgil Vătășianu, Nicolae Lascu or Camil Mureșanu<sup>7</sup> continued their remarkable research activity in the fields of archeology, medieval and modern history of Romania, the history of Transylvania, world history or art history. The major lines of study, opened by renowned professors from Cluj-Napoca, were continued, in the coming years, by some young teachers, who eventually became prominent names of contemporary historiography. The responsibility for the formation of young historians was undertaken by distinguished professors, among whom we should mention: academician Camil Mureșanu, Dean of the Faculty of History - Philosophy<sup>8</sup> between 1968-1976, academician Dumitru Protase – who, from 1974 on, became senior lecturer at the faculty mentioned above<sup>9</sup>, academician Pompiliu Teodor - Head of the Department of Middle History and Historiography<sup>10</sup>, emeritus professor Vasile Vese - lecturer and then reader at the Department of Universal History<sup>11</sup>, emeritus professor Ioan Piso, assistant lecturer and then lecturer at the same Department, professor Nicolae Bocșan – assistant lecturer between 1978-1982, professor Ovidiu Mureșanu – assistant lecturer between 1978-1984, professor Avram Andea - assistant professor between 1971-1981.

Valedictorian at the end of the four years of study, Ioan Horga became teacher of History at „Înfrățirea” Industrial Hight School, in Oradea, activity that he conducted until 1984. At the age of 28, he became member, first of the Municipal and then of the County Young Communist Union Committee, where he was responsible with the education sector. In the 5 years that followed, his qualities as teacher were fully demonstrated in the organization of professional contests and school Olympiads for the pupils of Bihor county<sup>12</sup>, especially in the national stages of those competitions (the National Informatics Olympiad was held in Oradea in 1989)<sup>13</sup>. From 1990, the professor Ioan Horga returned to the teaching activity, gaining tenure at the Department of History of "Emanuil Gojdu" National College. A year later, he began his collaboration with the freshly set up University of Oradea and got a doctoral scholarship at the University of Reims Champagne-Ardenne, France. On May 30<sup>th</sup>, 1995, in front of a commission made up of renowned specialists in modern history, church history and Romanian history (J.

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<sup>7</sup> Vasile Vese, *op. cit.*, p. 281-282

<sup>8</sup> *In memoriam, academician Camil Mureșanu*, article published in the on-line edition of the Făclia newspaper, in February 25<sup>th</sup>, 2015, available at <http://ziarulfaclia.ro/in-memoriam-academician-camil-muresanu/>, accessed on November 29<sup>th</sup>, 2016

<sup>9</sup> Eugen Gheorghe, *Academicianul născădean Dumitru Protase, decorat de președintele României*, article published in August, 11, 2016 on the website [www.timponline.ro](http://www.timponline.ro), available at <http://www.timponline.ro/academicianul-nasadean-dumitru-protase-decorat-de-presedintele-romaniei/>, accessed in November, 29<sup>th</sup>, 2016

<sup>10</sup> Doru Radosav, *Pompiliu Teodor - profesor și istoric (1930-2001)*, in Nicolae Bocșan, *Tentația istoriei. In memoria profesorului Pompiliu Teodor*, Presa Universitară Clujeană, Cluj-Napoca, 2003, p. 7-15

<sup>11</sup> See the official site of the Faculty of History – Philosophy, "Babeș-Bolyai" University, available at <http://www.ubbcluj.ro/ro/despre/prezentare/istoric>, accessed in November 29<sup>th</sup>, 2016

<sup>12</sup> *Ioan Horga, candidat la Rectorat: "Vreau să scoatem Universitatea din ghetoisare"*, article published in on-line edition of the Bihoreanul newspaper, in Aprilie, 22<sup>th</sup>, 2012, available at <http://www.bihoreanul.ro/stiri/ultima-or-31-6/ioan-horga-candidat-la-rectorat-vreau-sa-scoatem-universitatea-din-ghetoizare--101026.html>, accessed in December, 5<sup>th</sup>, 2016

<sup>13</sup> Official website of the National Informatics Olympiad available at <http://www.lego.rdsor.ro/oni98/info/ist.html>, accessed in December, 5<sup>th</sup>, 2016

Bérenger, Viviane Barrie-Currien – as thesis coordinator, Catherine Durandin<sup>14</sup>, Grunberg Bernard<sup>15</sup>, Pompiliu Teodor<sup>16</sup>) doctoral student Ioan Horga defended his thesis on „L’Église gréco-catholique roumaine (uniate) de Transylvanie à l’époque des Lumières. L’évêché d’Oradea (1780-1830)”<sup>17</sup>, obtaining his PhD in History with the qualification *Tres honorable a l’umanite*<sup>18</sup> At the same time, his collaboration with the University of Oradea became permanent by his tenure, in 1992, to the position of lecturer at the Department of History of the Faculty of History - Geography. The quality of his teaching and research activity have always been the strong points of his academic career, his tenure in the post of lecturer (1997) and assistant professor (2000), confirming his expertise in the field of modern and contemporary history, history of Europe and European integration.

His remarkable research and teaching experience was appreciated in major European university centers, professor Ioan Horga being invited to conference and deliver lectures and courses to students from Universities and Institutes in: Reims (France)<sup>19</sup>, Siena (Italy)<sup>20</sup>, Nancy (France)<sup>21</sup>, Wroclaw (Poland)<sup>22</sup>, Paris (France)<sup>23</sup>, Montpellier (France)<sup>24</sup>, Bologna - Campus Forli (Italy)<sup>25</sup>, Coimbra (Portugal), Salamanca (Spain), Rzeszow (Poland), Alicante (Spain)<sup>26</sup>, Bratislava (Slovakia), Banska Bistrika (Slovakia) ,

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<sup>14</sup> Professor at the National Institute of Eastern Languages and Civilizations and the Superior Institute of International and Strategic Relations, specialist in the history of Romania, see <http://www.inalco.fr/recherche-generale/durandin>, accessed in December, 5<sup>th</sup>, 2016

<sup>15</sup> Professor of modern History at the University of Reims, specialist in the history of Latin America, See <http://www.univ-reims.fr/site/laboratoire-labellise/habiter-ea-2076/l-equipe,11220,20294.html?>, accessed in December, 5<sup>th</sup>, 2016

<sup>16</sup> Professor of History at ”Babes-Bolyai” University of Cluj-Napoca, renowned specialist of the Enlightenment and pioneer in fields such as the history of ideas, the Romanian enlightenment and church history. See Doru Radosav, *op. cit.*, p. 7-9

<sup>17</sup> See database of the University of Reims, available at <http://www.theses.fr/1995REIML004>, accessed in December, 6<sup>th</sup>, 2016

<sup>18</sup> The diploma has been acknowledged by Romanian authorities based on the Order of the Minister of Education no. 3763/30.04.1996.

<sup>19</sup> Collaboration starts in 1998; at present, professor Ioan Horga teaches at the University of Reims, as Associate professor, the course entitled *Regional development policy & Central and Eastern Europe in Transition* and is member of the scientific committee of the Master studies programme “Specialists in the field of Integration and Neighborhood European Policies”

<sup>20</sup> Since 2003 he has been member of the scientific committee of the Master’s programme “Building of Europe” at the University of Siena and holds, as associate professor, the courses *EU’s Cohesion Policy* and *European Neighborhood Policy*

<sup>21</sup> The collaboration with the University of Nancy started in 2005 and covered a period of 8 years, being invited to conference on themes such as The new interpretation of the EU’s east frontier; Romania and EU

<sup>22</sup> In 2006 he was invited to conference in front of the students and the teaching staff of the University on the theme: *Romanian Integration in EU: present and future*

<sup>23</sup> In 2007 he was invited at the Institute of Political Sciences to conference on the theme *Religious frontiers and The New Europe*

<sup>24</sup> As visiting professor at the University of Montpellier, he held the conference *European Cohesion Policy* (2008).

<sup>25</sup> The conference *European Neighborhood Policy at the Eastern Frontier of EU* is held in 2010 as visiting professor

<sup>26</sup> As part of the Erasmus Teaching Mobility Programme he delivers courses at the University of Alicante and Coimbra (the university year 2003-2004), Salamanca (university year 2004-2005) and Rzeszow (university year 2007-2008)

Brescia (Italy), Venice (Italy), Krakow (Poland), Lublin (Poland), Prague (Czech Republic), Hannover (Germany), Maribor (Slovenia)<sup>27</sup>. His work was rewarded with distinctions such as: the *Pro Cooperazione Award* of the Academy of Hungarian Sciences - Debrecen Branch (2003)<sup>28</sup> the *Pro Universitas Award*, from the University of Debrecen (2010), the *Award of Excellence* of the Ministry of Culture of Romania (2010), the *Award of Excellence* of the European Institute of Romania (2012). In 2013, the National University in Uzhgorod, Ukraine, awarded him the distinction of *Doctor Honoris Causa* for the contributions brought to the fields of science and education.

The extensive experience accumulated in European universities, as well as the close understanding of internationalization projects and strategies promoted by such institutions determined professor Ioan Horga to bring forth similar objectives to the heads of Oradea University, in 2000. As a result, by the Rector's decision, a Department of International Relations and European Integration was established within the University of Oradea, with the mission of "promoting contacts with other universities and institutions abroad, in order to open the possibility for the participation of students, teachers and researchers in mobility programs, research and professional training"<sup>29</sup>. As head of that department, professor Ioan Horga institutionalized "active levers for developing a consistent package of inter-university relations with similar institutions from Belgium, France, Italy, Germany, Greece, Spain, Portugal, Poland, Slovakia and Hungary."<sup>30</sup> For 7 years, European programs, aimed at increasing the mobility of teachers and students in the European space, along with programs that could attract European funds for teaching or research projects were intensively promoted. During his mandate, Oradea University signed an Agreement for Scientific and Teaching Cooperation whereby the University became a member of the group of institutions enabled to organize the master's degree program *The Process of Building Europe*<sup>31</sup>; professor Ioan Horga also managed the General Secretariat of the Carpathian Region Universities Association (ACRU)<sup>32</sup>.

The institutional framework thus created, professor Ioan Horga managed to use favorable circumstances in order to implement the project "Action Learning for SMEs in Bihor, Salaj and Satu Mare counties - a new model of entrepreneurial school in the field of human resources", funded by Phare Program 2000 Economic and Social Cohesion, Human Resources Development. The actions performed in association with the partners in the project (the Local Council of SMEs of Oradea, Salaj Branch of SMEs, The Chamber

<sup>27</sup> See the structure of Romanian Association of the International Relations and European Studies available at <http://www.rise.org.ro/structura/ioan-horga/>, accessed in December, 6<sup>th</sup>, 2016

<sup>28</sup> The prize was awarded for the collaboration with Hungarian specialists, for the quality of conferences held as part of Symposia and Scientific Sessions organized in our neighboring country, as well as for the studies published in Hungarian journals.

<sup>29</sup> See the official website of the International Relations Department, University of Oradea, available at [http://arhiva-www.uoradea.ro/romanian/topic/52/Departamentul\\$de\\$Relatii\\$Internationale.html#prez](http://arhiva-www.uoradea.ro/romanian/topic/52/Departamentul$de$Relatii$Internationale.html#prez), accessed in December, 6<sup>th</sup>, 2016

<sup>30</sup> Ioan Horga (coord.), *10 ani de Relații Internaționale și Studii Europene*, Oradea University Press, Oradea, 2013, p. 6

<sup>31</sup> See the official website of the Centro di Ricerca sull'Integrazione Europea. Master in European Studies, available at <http://www.crie.unisi.it/en/1004/master-in-european-studies.htm>, accessed in December, 6<sup>th</sup>, 2016

<sup>32</sup> Between 2006 and 2009, professor Ioan Horga held the position of Secretary General of this inter-university association. Currently he is the University of Oradea representative. See the official website of the *Association of Carpathian Region Universities. Membership*, available at <http://acru.uvlf.sk/membership.html>, accessed in December, 6<sup>th</sup>, 2016

of Commerce, Industry and Agriculture Satu Mare, The Chamber of Commerce and Industry Bihor, The Chamber of Commerce and Industry Salaj, The Revans Institute for Action Learning & Research - University of Salford, UK) led to the establishment of the Center for Information and European Consultancy (CICE), which was provided with the necessary technical and informatics equipment, and a specialized book fund, later included in the CICE library; a total of 300 students from the University of Oradea (support staff and teaching staff with managerial positions) and different business representatives from Bihor, Salaj and Satu Mare also benefited from training sessions. Another source of funding used was the Jean Monnet Programme of the European Commission, which opened the possibility to establish, in 2002, at the University of Oradea, two Jean Monnet Chairs, one of them being the Euroregional Studies one<sup>33</sup>, headed by professor Ioan Horga<sup>34</sup>. The interdisciplinary character of this Jean Monnet Chair was fully valued in activities related to the *Euroregional Studies and Cross-border Relations* Master's program, students from Oradea having thus the possibility to deepen their knowledge in various fields (economics, geography, international relations, European studies, CBC, history, communication, law, etc.) and gain practice as employees characterized by an open mind and the ability to communicate in a multicultural environment.

With a constant concern for developing curricular areas that the University of Oradea could make available to high school graduates, professor Ioan Horga, together with colleagues from the Departments of History, Sociology and Law, set up, in 2003, the International Relations and European Studies (RISE) license program. The wide range of scientific areas that were part of the proposed subjects in the curriculum ensured the formation of graduates with solid interdisciplinary training, so as they might be able to meet job requirements. Moreover, from the very first semester, students had the opportunity to study at least two foreign languages and acquire skills in the field of information and communication technology. Another key feature of the curriculum was the practical character of most courses offered to students, and especially the internships performed by students in institutions and organizations in Oradea. For their deployment, professor Ioan Horga concluded cooperation agreements with The Council of SMEs Bihor, The Employers' Federation of Bihor county, Oradea Metropolitan Area, The Prefecture of Bihor County, the Carpathian Euroregion Foundation etc., thereby strengthening the links between the University of Oradea and the local socio-economic environment. In addition to the theoretical and practical training of students, professors Ioan Horga also created an environment where students could express their ideas freely, present projects or demonstrate their knowledge. As expected, the management of Bachelor and Master specializations were provided first by the Collective of European Studies and International Relations, and then by the Department of International Relations and European Studies, structures created at the initiative of professor Ioan Horga. The team of teachers and scholars gathered around Ioan Horga imposed itself, over the years, as a "close-knit and dynamic structure"<sup>35</sup>, individualized within the national and the European academic environment.

In the scientific domain, with the same energy and determination, directed for the benefit of Oradea academic community, professor Ioan Horga strengthened the collaboration with the team of researchers from the Department of Geography and Regional Development at the University of Debrecen. Together with professor Istvan Suli-

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<sup>33</sup> Department established by the EAC/A2/BBQ/AmD decision no.16138, of July 24th, 2002.

<sup>34</sup> Ioan Horga (coord.), *op. cit.*, p. 40

<sup>35</sup> *Ibidem*, p. 11

Zakar, he laid the foundations the *Institute for Euroregional Studies Oradea-Debrece*n (ISER, 2005), as Jean Monnet European Centre of Excellence<sup>36</sup>. Meanwhile, ISER has become a real "research pole for European border issues"<sup>37</sup>, the results being published in *Euro*limes<sup>38</sup> and in numerous collectively edited volumes<sup>39</sup>. Under the aegis of the Institute, the research team carried out numerous projects with European, local and national financing. Thus, in addition to coordinating the Jean Monnet Modules earned<sup>40</sup> ISER members have implemented projects funded by: PHARE CBC 2006 INTERREG III A; Cross-Border Cooperation Programme Hungary - Romania 2007 - 2013; Transnational Cooperation Programme South East Europe; the European Commission – European Thematic Network for European Studies. With another funding direction, the local one, research was also performed, its results contributing to the understanding of the local and the regional past, to the valuing of heritage and the development of the local community<sup>41</sup>.

His experience, exigency, energy, visionary spirit, obvious organizational and interpersonal skills, fully demonstrated throughout his entire professional activity, were elements that recommended professor Ioan Horga for the position of Vice Rector of the University of Oradea. Despite the very short term of office (2007-2008), the objective to increase the number of collaborative partnerships, concluded with other European universities, was doubled by that of ensuring the openness of the academic space to both civil society and the media. By the creation of an Office for Communication, University of Oradea managed to develop an institutional relationship with the local and national media and enter the online environment, the beneficial effects being visible in improved communication with different actors in society and the constant contact with the public opinion. In 2008, Ioan Horga resigned from the Vice-Rector position to become Dean of the Faculty of History, Geography and International Relations, a position he occupies at present at the Faculty of History, International Relations, Political Science and Communication Studies.

Benefiting from an extensive educational and scientific activity and being animated by a constant desire to discover and shape young researchers, Professor Ioan Horga directed his efforts towards coordinating doctoral internships. In 2006, he began supervising doctoral theses in the field of History, as part of the Doctoral School within the University of Oradea, and continued to materialize his desire to form many specialists in international relations and European studies in 2010, when he moved to "Babes-Bolyai" University of Cluj-Napoca<sup>42</sup>. His skills and expertise are recognized at the European

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<sup>36</sup> It is the 3rd created Center of Excellence, after those in Cluj-Napoca and Timișoara. In 2010, a similar center was created in Iasi.

<sup>37</sup> Ioan Horga (coord.), *op. cit.*, p. 9

<sup>38</sup> Biannual publication, listed in international databases, *Euro*limes appeared in the local publishing landscape in 2006. Under the guidance of Professor John Horga, the editorial staff publishes thematic issues, offering each time a different perspective on borders. See the website of the *Euro*limes journal, available at [http://www.igri.ro/?page\\_id=441](http://www.igri.ro/?page_id=441), accessed in December 6<sup>th</sup>, 2016

<sup>39</sup> The 26 volumes published so far can be accessed on the official ISER website of ISER, available at <http://www.iser.rdsor.ro/e-books.htm>, accessed in December 6<sup>th</sup>, 2016

<sup>40</sup> See the official site of ISER, Projects section, available at <http://www.iser.rdsor.ro/project.htm>, accessed in December, 6<sup>th</sup>, 2016

<sup>41</sup> Ioan Horga (coord.), *op. cit.*, p. 50-53

<sup>42</sup> In 2010 he receives the right to conduct doctoral theses in international relations and European studies within the Doctoral School - the International Relations and Security Studies. See The Doctoral School of the International Relations and Security Studies – teaching personnel, available at



level as well. Thus, in the period 2009 – 2010, professor Ioan Horga was invited to become member of The Commission for the assessment of doctoral theses, as part of the annual competition organized by the Committee of the Regions. The scientific, professional and ethical character of his supervising activity, along with the patience demonstrated in outlining every niche of research and dedication to follow the development of each doctoral student are reflected in the several dozens of doctoral thesis supervised so far by professor Ioan Horga, and also in the character of young specialists whom he mentored.

It is not an easy task to present, in just a few pages, the prodigious activity of the person to whom this volume is dedicated. Surely some biographical data might have been omitted, others have been probably just mentioned, while others are extensively presented. We can, however, conclude that the following elements characterize Ioan Horga's personality: innovative and inventive spirit; energy invested in each project; determination to reach objectives; seriousness and rigor in addressing each activity; warmth and passion demonstrated while talking to students and doctoral students; care for younger colleagues, materialized in valuable pieces of advice, and respect for senior colleagues; dedication in defending the interests of the collective to which he belongs. By summarizing in few words his personality, we merely begin to shape a portrait, based on vocational qualities of the Professor IOAN HORGA



# THE VOCATION OF RESEARCH: THE EUROPEAN SPACE AND THE STUDY OF BORDERS IN THE SCIENTIFIC WORK OF PROFESSOR IOAN HORGA<sup>1</sup>

*My gratitude to my Professor  
to whom I owe my entire career!*

**Mircea BRIE\***

The contemporary European realities, the European construction and the particularities of the EU are general themes that define the milestones of rich scientific research of Professor Ioan Horga in the last two decades. His scientific work, which includes historical research during his early career, has about 200 titles. These works include research analysis and synthesis published as monographs, books of sole author or in collaboration with others, coordinated and edited collective volumes and conference proceedings, specialized studies and articles published in prestigious ISI journals or in various international databases. His publications have been published by prestigious publishing houses and journals of institutions in the country and abroad (France, Belgium, Britain, Portugal, Hungary, Poland, Moldova, Italy, USA, Spain, Ukraine, Sweden, Germany, etc.).

Trained as a historian, Ioan Horga managed through his interest in international relations, European studies and security studies, and through a wide openness to interdisciplinary, multidisciplinary and transdisciplinary, to give his research a complex perspective and necessary understanding of phenomena and processes current in the Europe of today.

His research activity is crowned by a rich activity in academic teaching. He is, through his role in the academic landscape from Oradea and at national level, a road opener, a founder of the school, a benchmark for the new generation that he has helped to shape.

From this perspective, mainly I but also my colleagues at the University of Oradea, owe respect for a man who served a cause: the creation of a school of international relations and European studies at Oradea. Furthermore, the inclination towards niche areas such as research on the (euro)regional development, on the study of borders and CBC managed to put Oradea on the map. His research is, from this point of view, a reference standard nationally and internationally. From this position, Professor Ioan Horga campaigned for institutionalizing at the University of Oradea, and also at nationwide universities (through work in the National Council for Attesting Titles, Diplomas and Certificates - CNATDCU and the Romanian Agency for Quality Assurance in Higher Education - ARACIS) of a field of study in International Relations and

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<sup>1</sup> This paper was published in Mircea Brie, Alina Stoica, Florentina Chirodea (coord.), *The European Space Borders and Issues. In Honorem Professor Ioan Horga*, Editura Universității din Oradea/Debreceen University Press, Oradea/Debreceen, 2016, 586 p. 45-65.

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European Studies, and Security Studies. This rich activity of the university management activity is part of a comprehensive process of organizing Romanian university studies in the context of Romania's integration in Euro-Atlantic structures.

Without taking upon highlighting the rich work of Professor Ioan Horga, we would like to emphasize his role in establishing institutional structures that were the basis of outstanding research. The creation of the Department of International Relations and European Studies, a research institutional structure (International Centre for Euroregional Research, then the Institute for Euroregional Studies - Jean Monnet Centre of Excellence) or some specialized journals have created the preconditions for a rich research whose landmark is the scientific expertise of Professor Ioan Horga.

The complex analyses on the European space are crowned with an overview of European realities, with the capacity to see beyond the historical realities of European prospects.

Either that he has taken into account the historical perspective on the European space or he has been preoccupied with the present realities, Professor Ioan Horga's vocation is leading the research, the ability to see both the general and the particular. *Europa Luminilor*<sup>2</sup>, *Europa secolului al XIX-lea*<sup>3</sup> or *Relațiile internaționale de la echilibru la sfârșitul concertului european (secolul XVII – începutul secolului XX)*<sup>4</sup> are works of historical synthesis that come to argue our statements regarding the superior ability of Professor Ioan Horga to understand realities by linking behaviors of contemporary European history to the "actual history"<sup>5</sup>. His European thinking sees and understands the European realities, including historical stands when these writings calls for the "democratization of European historiography" which is required to rise above national ones<sup>6</sup>. Besides, Professor Horga noted the need to reform the educational and cultural policies in order to create solidarity and cooperation pillars of the European construction process, namely the creation of a European identity. Complex realities of the process of European construction, successes and difficulties recorded during the stages of this process, and opening eastward toward New Europe, are topics of attention and understanding of this dedicated and devoted researcher. *Construcție Europeană. Tradiție, realitate și perspectivă* (1998) is not only a historic telltale of the process of European construction, but reference is made to a dispute between national versus European. As the Europeanist as I've known him, Professor Ioan Horga advocates for strengthening the European institutions and reminds about "reducing the significance of borders"<sup>7</sup> prefacing future research in the study of European borders. European institutions, the European Union functionality as a whole, and other international organizations have been subject of his research at both general and particular. Scientific papers are both applied and theoretical, analytic, and synthetic. In this last category, the book *Teoria relațiilor internaționale*<sup>8</sup> is positioned as a fundamental work of his research.

<sup>2</sup> Ioan Horga, *Europa luminilor*, Editura Universității din Oradea, Oradea, 2002.

<sup>3</sup> Idem, *Europa secolului XIX*, Editura Universității din Oradea, Oradea, 2000.

<sup>4</sup> Ioan Horga; Brie M., *Relațiile internaționale de la echilibru la sfârșitul concertului european (secolul XVII – începutul secolului XX)*, Editura Universității din Oradea, Oradea, 2006.

<sup>5</sup> Ioan Horga, *Europa luminilor...*, p. 7.

<sup>6</sup> Idem, *Europa secolului XIX...*, p. 13-14.

<sup>7</sup> Idem, *Construcție Europeană. Tradiție, realitate și perspectivă*, Editura Universității din Oradea, Oradea, 1998, p. 6.

<sup>8</sup> Idem, *Teoria relațiilor internaționale*, Editura Universității din Oradea, Oradea, 2006.

The process of European enlargement towards the east began after the fall of communist regimes in Central and Eastern Europe, and remained constant to the core of Professor Horga's research. Two collective volumes, coordinated by Professor Horga, were the center of debate between the contribution of the media<sup>9</sup> and its relation to the governance<sup>10</sup> in the context of EU enlargement. The purpose is to find solutions for a better governance at both national and sub-national (local, regional) and supranational (European) levels. The European enlargement eastwards brings in his opinion challenges that require political and institutional transformation in national and European decision-making process. Moreover, even in the years before and after the wave of EU accession of Central and Eastern European states in 2004, Ioan Horga anticipates the need for systemic reformation of the European Union in the context of enlargement to the east<sup>11</sup>. This need is given by the particularities of these countries in the enlargement process<sup>12</sup> or by economic realities<sup>13</sup>, the realities of their cultural heritage and social identity. Romanian historical peculiarities, the specific national context of the accession process and economic realities often serve as case studies. The particular realities of central and eastern Europe led him to invoke European institutional reform based on intercultural dialogue, the need for democratization of decision-making. European Parliament debates regarding European enlargement in the past, the functionality, are among his academic concerns. These include works such as *The European Parliament, Intecultural Dialogue and European Neighborhood Policy*<sup>14</sup> or *Le Parlement Européen et la Démocratisation du Processus Décisionnel Européen*<sup>15</sup>. Reforming the European system includes debates regarding *The Multilevel Governance*, which Ioan Horga associated to respecting the principle of subsidiarity<sup>16</sup>, regional governance and institutional outlook on the Committee of the

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<sup>9</sup> A. Landuyt, Ioan Horga and R. de La Brosse, *The contribution of Mass-Media to the Enlargement of EU*, International Institute of Administrative Studies, Bruxelles, 2003.

<sup>10</sup> F. Maron, Ioan Horga and R. de La Brosse, *Media and Governance Facing the Challenge of the EU Enlargement*, International Institute of Administrative Studies, Bruxelles, 2005.

<sup>11</sup> Ioan Horga, „The Enlargement of the European Union Increases the Need for New Solutions for European Good Governance. Which is the Place of the Media in this Process”, in F. Maron, I. Horga, R. de La Brosse, *Media and Governance Facing the Challenge of the EU Enlargement*, International Institute of Administrative Studies, Bruxelles, 2005, p. 57-76; Ioan Horga, „General Considerations on European Enlightenment”, in I. Tepelea, C. Antal, *Proceedings of the 27th ARA Congress*, Polytechnic International Press, Oradea, 2003, p. 175-184.

<sup>12</sup> Ioan Horga, „Romanian and its historical peculiarities amongst the newcomers in the European Union”, in A. Landuyt, D. Pasquinnucci (ed.), *Gli allarmanti della CEE/EU (1961-2004)*, il Mulino, Bologna, 2005, p. 565-592.

<sup>13</sup> Ioan Horga and L. Şoproni, „Romania's Accession to the European Union. Economic Conditions”, in J. Kundera (ed.), *Economic Relations in the EU Enlarged*, Kolonia Limited, Wrocław, 2007, p. 319-329.

<sup>14</sup> Ioan Horga; G. Silaşi; I. Suli-Zakar and S. Sagan, *The Parliament European, Intecultural Dialogue and European Neighborhood Policy*, Editura Universitii din Oradea, Oradea, 2009.

<sup>15</sup> Cristina Dogot and Ioan Horga, „Le Parlement Européen et la Démocratisation du Processus Décisionnel Européen”, in *The Romanian Review of European Governance Studies*, 2009, vol. 1, 1, p. 18 – 24.

<sup>16</sup> Ioan Horga, „The Multilevel Governance (MLG) and the Respect of the Subsidiarity Principle”, in I. Horga, I. Suli-Zakar (ed.), *Cross-Border Partnership. With special regards to the Hungarian-Romanian-Ukrainian Tripartite Border*, Editura Universităţii din Debrecen/Editura Universităţii din Oradea, Debrecen/Oradea, 2010, p. 169-175.

Regions<sup>17</sup>, but also to the needs of institutional and legislative reform after the Treaty of Lisbon in the context of *The White Paper of Multilateral Gouvernance*<sup>18</sup>. Lastly, the European enlargement is seen as a geopolitical reality that has imposed a new European agenda, new priorities and interests, both internal and external. The new Member States in line with their new status assume besides interests and preferences “a possible higher interest”<sup>19</sup>. The legitimacy of the European enlargement, seen in both its meanings (States and the European Union), is closely linked to the reformation of the EU.

The research of Professor Horga about the European space, the co-operation between organizations, countries or regions, the cooperation at the EU's borders, have as binder research the European Neighbourhood Policy (ENP). the EU external relations took as a starting point the support from the European Neighbourhood Policy, the results of which were noted by the European Commission as positive ever since the early years of its launch in 2003<sup>20</sup>. “The ENP has strengthened relations with partner countries and brought tangible benefits to both the Union and its partners, including the launch of regional initiatives and support to democratization in the European neighborhood”<sup>21</sup>. Under the influence of the European Neighbourhood Policy, the concept of external border of the European Union tends to acquire new forms of expression. On the one hand we find a flexible contact area between the two sides of the border. Such a tendency is amplified by cross-border cooperation mechanisms, through Euroregions and European instruments successfully implemented at the external border<sup>22</sup>. On the other hand, the actions of the European Union which is trying to implement regional cohesion policies on its borders today are, according to analysts, proving that the Union is strengthening its external borders, currently taking this into account, at least for now, the variant of a slowdown process of enlargement towards east, without effectively closing doors<sup>23</sup>. The

<sup>17</sup> Ioan Horga, „Multilevel Governance (Mlg) and Subsidiary Principle in White Paper of Mlg of the Committee of the Region (CoR)”, in I. Horga, I. Gh. Barbulescu, A. Ivan, M. Palincsak, I. Suli-Zakar (ed.), *Regional and Cohesion Policy – Insights Into the Role of the Partnership Principle in the New Policy Design*, Debrecen University Press & Oradea University Press, Debrecen/Oradea, 2011, p. 158-164

<sup>18</sup> D. Gal and Ioan Horga, „Multilevel Governance from Lisbon Treaty to the White Paper of Multilateral Gouvernance”, in *Revista de Estudios Juridicos of the University of Jaen*, 2010, nr. 10 (Segunda Época)

<sup>19</sup> Cristina Dogot and Ioan Horga, „Enlargement Process, Classic Geopolitics, and EU Internal Priorities”, in *Eurotimes*, 14/Autumn, 2012, p. 167.

<sup>20</sup> See *Communication de la Commission. Une politique européenne de voisinage vigoureuse*, Bruxelles, 05/12/2007, COM(2007) 744 final.

<sup>21</sup> EUR-Lex, Access to European Union law, *Regulamentul (UE) NR. 232/2014 AL Parlamentului European și al Consiliului din 11 martie 2014 de instituire a unui instrument european de vecinătate*, Jurnalul Oficial al Uniunii Europene, L 77/27, 15.03.2014, [http://eur-lex.europa.eu/legal-content/RO/TXT/?uri=uriserv:OJ.L\\_.2014.077.01.0027.01.RO&id=123456789](http://eur-lex.europa.eu/legal-content/RO/TXT/?uri=uriserv:OJ.L_.2014.077.01.0027.01.RO&id=123456789), accessed on 30.11.2016.

<sup>22</sup> Iordan Gheorghe Bărbulescu (coord.); Mircea Brie and Nicolae Toderaș, *Cooperarea transfrontalieră între România și Ucraina, respectiv între România și Republica Moldova. Oportunități și provocări între 2014-2020*, Tritonic, București, 2016

<sup>23</sup> In connection to the “orange revolution” in Ukraine, the European Commissioner for External Relations and European Neighbourhood Policy Benita Ferrero-Waldner declared at December 1<sup>st</sup>, 2004 that „la question de l'Ukraine dans l'UE n'est pas à l'ordre du jour. Mais il est clair que nous ne fermons aucune porte”. See Régis Matuszewicz, *Vers la fin de l'Élargissement?*, in Laurent Beurdeley, Renaud de La Brosse, Fabienne Maron (coord.), *L'Union Européenne et ses espaces de*

proximity area of the European Union was among his concerns before the official launch of ENP. Topics such as the democratization of Central and Eastern Europe were in the research agenda by connection to the role played in this process by the media and new communication technologies and information. Just to remind some of the titles published along with one of his friends, the French Professor Renaud de La Brosse: *Two media threats to democracy in Central and Eastern Oriental*<sup>24</sup> or the collective volume *The Role of the Mass-Media and of the New Information and Communication Technologies in the Democratisation Process of Central and Eastern European Societies*<sup>25</sup>. Romania joined the European Union led to a growing interest for the neighbouring space. In 2007, together with Alla Roșca, published a study about the Republic of Moldova, *La Moldavie tete de pont de l'UE*<sup>26</sup>, where the complexity of the realities of this region, but also the difficulties in implementing the ENP are analysed. The European Neighbourhood Policy is then approached in relation to Romanian state border with Ukraine<sup>27</sup>, in relation to inter-university cooperation<sup>28</sup>, intercultural dialogue<sup>29</sup> and contribution to the responsibilities of Romania under this policy<sup>30</sup>. Reforming the ENP and new EU policies in relation to proximity to the eastern approach find a place in his studies of strategies, opportunities and challenges of the new format of the Eastern Partnership<sup>31</sup> or analysis regarding the permeability or impermeability of the EU's eastern borders in the context of the Eastern Partnership<sup>32</sup>.

Regional and Euroregional development remained constant to the attention of Professor Ioan Horga both in the scientific research, and institutional, educational or research management. He created at the University of Oradea, together with colleagues

*proximité. Entre stratégie inclusive et partenariats removes: quell avenir pour le nouveau voisinage de l'Union?*, Bruxelles, Bruylant, 2007, p. 109.

<sup>24</sup> Ioan Horga, R. de La Brosse, „Two media threats to democracy in Central and Eastern Oriental”, in *Democrația în Europa Centrală și de Sud-Est- Aspirație și Realitate (secolele XIX-XX)*, Editura Muzeului Sătmărean, Satu Mare, 2000.

<sup>25</sup> Ioan Horga, R. de La Brosse (ed.), *The Role of the Mass-Media and of the New Information and Communication Technologies in the Democratisation Process of Central and Eastern European Societies*, International Institute of Administrative Studies, Bruxelles, 2002.

<sup>26</sup> Ioan Horga, A. Roșca, „La Moldavie tete de pont de l'UE”, in R. de la Brosse, L. Beurdelai, F. Maron(ed.), *Quel perspective pour la politique de voisinage de l'UE?*, Bruxelles, Bruyere, 2007, p.164-182.

<sup>27</sup> Ioan Horga, „La frontiere roumaino-ukrainienne de la perspective de la politique de voisinage”, in G. Edelstam, T. Lunden (ed.), *European Neighbourhood Policy and Security: Challenges, Goals and Means*, Stockholm, 2008.

<sup>28</sup> Ioan Horga; Mircea Brie, „La coopération interuniversitaire aux frontières extérieures de l'Union Européenne et la contribution à la politique européenne de voisinage”, in G. Rouet, P. Terem (coord.), *Elargissement et politique Europeenne de voisinage*, Bruylant, Bruxelles, 2008, p. 203-233

<sup>29</sup> Ioan Horga; G. Silași; I. Suli-Zakar and S. Sagan, *op. cit.*; Mircea Brie; Ioan Horga and Sorin Șipoș (coord.), *Ethnicity, Confession and Intercultural Dialogue at the European Union's East Border*, Editura Universității din Debrecen/Editura Universității din Oradea, Debrecen/Oradea, 2011.

<sup>30</sup> Ioan Horga; A. M. Costea, „Eastern Partnership between the Permeability and Impermeability of EU Eastern Borders”, in C. Pacheco Amaral, G. Gabrichidze, Ioan Horga, A. Kruglashov, E. Latoszek, M. Pachocka, V. Cucerescu, *EU Relations whit Eastern Partnership: Strategy, Opportunities and Challenges*, Print-Caro, Chișinău, 2016.

<sup>31</sup> M. Pachocka; E. Latoszek; V. Cucerescu; G. Gabrichidze; Ioan Horga; A. Kruglashov and Amaral, C. Pacheco, *EU relations with Eastern Partnership: strategy, opportunities and challenges*, Editura Print-Caro, Chișinău, 2016.

<sup>32</sup> Ioan Horga; A. M. Costea, *op. cit.*

from the University of Debrecen, a research center that promotes research in euroregional development, and specialized masters programs which have the euroregional study or the regional development specialization. The Institute for Euroregional Studies (IRES) was formed as a result of both the need for developing an institutional research collaboration, as well as for the recording of the result of anormal rapprochement between the two academic communities. „As for the regional and Euroregional development at the Hungarian-Romanian border there has been a highlight on the role played by smaller or larger town from within the border area in creating development poles. The towns are centres of the economic space of their counties and the value of the inner potential depends on the distance from the county-seat”<sup>33</sup>. Regions, including the border (Euroregions) are addressed from the perspective of economic, social and cultural structures in which the integrated development of human resources and mobility take place<sup>34</sup>. In 2006, Professor Ioan Horga, along with his close collaborator István Suli-Zakar, coordinates two collective volumes analyzing the national and European prospects related to regional development in the Euroregional space, CBC Romanian-Hungarian (*Regional Developpment in the Romanian-Hungarian cross-border space. From national to European perspective*<sup>35</sup>) and, a second volume (*Challenges and Perspectives in the Regional and Euroregional Issues in the New Europe*), the challenges and the perspectives of regional and Euroregional development in the space of the New Europe<sup>36</sup>. Administrative territorial reform has been a much discussed topic in the Romanian public space in recent years without finding resolve at the decision-making level. In this debate, Professor Ioan Horga proposed to take into account the realities of cultural and historical heritage, historical regions of functionality that are part of the Romanian state. The historical perspective is important in defining regional structures, it was born of a geographical reality and cultural, economic and social which must be taken into account today. Appeal is made to a debate on regional structures to include reference to both local space, subregional, but also at the national and supranational space<sup>37</sup>. The historical regional perspective is then associated with a new type of regional approach: „The subject of regionalization is even more pressing if we speak about frontier cities in Romania, because they are influenced by the national level, the regional one and also by the interregional level, given the fact that their border is also the border of the Romanian state and often citizens cross it or the regional authorities develop

<sup>33</sup> Ioan Horga, I. Suli-Zakar, „Contributions of Institute for Euroregional Studies Oradea-Debrecen to Shaping the Border into a Space for knowledge and Development”, in *Analele Universității din Oradea*, Seria Relații Internaționale și Studii Europene, vol. 2, 2010, p. 170-183. Pentru o mai complexă imagine asupra activității desfășurate de IRES vă recomandăm parcurgerea lucrării I. Suli-Zakar, Ioan Horga, A. Ilieș, C.V. Țoca, „Institute for Euroregional Studies - « Jean Monnet » European Center of Excellence”, in I. Suli-Zakar, *Falvainak sorsa es A vasosnovelkedes Szakasza*, Debrecen University Press, Debrecen, 2011, p. 15-45.

<sup>34</sup> Ioan Horga, A. Ilieș, O. Dehoorne, „Romania, regional internal and external economical structures integration, development and human mobility”, in *Human Mobility in a Boreless World?*, Societa Geografica Italiana, 2001, p. 117-134

<sup>35</sup> I. Suli-Zakar, Ioan Horga, *Regional Developpment in the romanian-hungarian cross-border space. From national to European perspective*, Editura Universității din Debrecen, 2006.

<sup>36</sup> Ioan Horga, I. Suli-Zakar, *Challenges and Perspectives in the Regional and Euroregional Issues in the New Europe*, Editura Universității din Debrecen/Editura Universității din Oradea, Debrecen/Oradea, 2006.

<sup>37</sup> Ioan Horga, „Romanian perspective on the regional and local structures”, in C. Pacheco Amaral (ed.), *The External Projection of Regional Autonomy in Europe*, L'Harmattan, Paris, 2010.



cooperation projects with other centres from the frontier regions”<sup>38</sup>. Lastly, regional and Euro-regional development topics in the area of Central and Eastern Europe is associated to the cohesion policy and regional development policies. In 2011, as a coordinator and collaborator, Ioan Horga published the collective volume *Regional and Cohesion Policy – Insights Into the Role of the Partnership Principle in the New Policy Design*<sup>39</sup>. This, along with other papers regarding the White Paper of the committal of the Region (CoR)<sup>40</sup>, multilevel governance subsidiarity principle, regional policy in Central and Eastern Europe<sup>41</sup>, constitute the main core of the thesis proposed in this area, where the state remains an important partner of the European Union<sup>42</sup>.

Cross-border cooperation has proved to be one of the favorite topics, associated to the research of the euroregional border space, which Professor Ioan Horga approached with attention and passion. This research topic is based on the complex analysis of the space frontier, especially of the border between Romania and Hungary, where an emphasis is on the need to build a dialogue, the institutional-legislative levers contributing to the development of cooperation between the two sides of the border. A special role in this process was played by European instruments to stimulate cross-border cooperation. We refer here to the institutional and legislative structures of regional/euroregional European funds for territorial cooperation, especially those targeted specifically by the CBC. Developments marked the transition from the communist period corresponded in large over a period of openness compared to the neighboring space in Central and Eastern Europe. Contained in a Euro-Atlantic integration process, Romania, like other states in this region, responded positively, registering significant progress on the path of dialogue and development cooperation opening its borders with neighboring states allied. Border cooperation relations between Romania and Hungary have benefited from a comprehensive analysis of ten years after the fall of communism<sup>43</sup>. The emphasis is on the effects of cooperation has in the border area. The actors involved in this process that creates leverage and develop relationships beyond the perspective and the national, regional and local level, in line with the realities and mutual interests are identified and

<sup>38</sup> Ioan Horga, A. M. Ghimiș, “The role of the borders in the Romanian regionalization”, in *Transylvanian Review*, ISI Journal, vol. XXIII, Supplement No. 2, 2015, p. 164.

<sup>39</sup> Ioan Horga, I. Gh. Barbulescu, A. Ivan, M. Palincsak, I. Suli-Zakar, *Regional and Cohesion Policy – Insights Into the Role of the Partnership Principle in the New Policy Design*, Editura Universității din Debrecen/Editura Universității din Oradea, Debrecen/Oradea, 2011.

<sup>40</sup> Ioan Horga, „Multilevel Governance (Mlg) and Subsidiary Principle in White Paper of Mlg of the Committee of the Region (CoR)”, in I. Horga, I. Gh. Barbulescu, A. Ivan, M. Palincsak, I. Suli-Zakar (ed.), *Regional and Cohesion Policy – Insights Into the Role of the Partnership Principle in the New Policy Design*, Debrecen University Press & Oradea University Press, Debrecen/Oradea, 2011, p. 158-164.

<sup>41</sup> Idem, „Regional Policy in Central and Eastren Europe”, in *Analele Universitatii din Oradea*, Seria Relații Internaționale și Studii Europene, vol. VI, 2014, p. 7-22; Ioan Horga, A.-M. Costea, „The Regional Policy in the EUMS from Central and Eastern Europe between Decentralisation and Recentralisation”, in *Debater a Europa*, nr. 12, janeiro/junho, 2015, p. 103-134.

<sup>42</sup> Idem, „The State remained the most important partner of the European Union in the field of regional policy in Central and Eastern Europe”, in E. Latoszek, M. Proczek, A. Klos, M. Pachocka, E. Osuch-Rak (ed.), *Facing the Challenges in European Union. Re-thinking of EU Education and Research for Smart and Inclusive Growth*, EuInteg, Warsaw, 2015.

<sup>43</sup> Idem, „Co-operation and effects on borderlands Romania-Hungary in the ten years after communism fall”, in The 7 Geopolitical conference’s act *Changing role of border areas and regional politics*, Lodz, 2000, p. 89-98.

analyzed by Ioan Horga in 2005<sup>44</sup>. Together with Professor István Süli- Zakar at the University of Debrecen, edit the collective volume in 2010, *Cross-Border Partnership. Whit special regards to the Hunagrian-Romanian-Ukrainian Tripartite Border*<sup>45</sup>, which contains case studies and complex analytical references. References to the Romanian-Ukrainian border were on the research agenda of Professor Horga on other occasions. In 2009 he published a paper on European instruments of Romanian-Ukrainian border cooperation<sup>46</sup>. Special attention is given in recent years by Professor Ioan Horga to the evaluation border cooperation. In 2013 he coordinates the evaluation volume *Evaluarea cooperării transfrontaliere la frontierele României*<sup>47</sup>, with public and material valorisation of scientific research regarding the evaluation of CBC programs<sup>48</sup>. He advocates for the institutionalization of public policies and programs evaluation at European (and national) level to implement appropriate practices and to act in the public expertise in evaluation. Academia is required to be involved in the evaluation process that contribute to the development of public policies and programs throughout their implementation. On-going assessment turns out to be from this point of view a tool that can be a natural adjustment imposed by the realities recorded in the running process<sup>49</sup>.

Studying various types of borders by Professor Ioan Horga conferred to the city of Oradea and to the University of Oradea, through the Euroregional Studies Institute, a privileged place in this niche area not only nationally but also internationally. A successful project initiated and coordinated by Ioan Horga was and remains the *Eurolimes* journal. It is a journal that, through 20 issues published so far, constitutes a genuine epistemological collection relating to borders. Each issue is a consistent attempt to reflect an “image”, a facet of the rich typology of the border. This project is presented in the study *Why Eurolimes?* in the first issue. „Nowadays, to dedicate a journal to the issue of the borders in Europe – as *Eurolimes* is – seems to be an outdated question from both the point of view of process of the European integration, or the enlargement, and from the point de view of the expectations of the Europeans, who wish to circulate, work and live wherever they want to. But the issue of the border is much more complex than we assume from the viewpoint of its essence and of the different experiences of Europe as a whole ... This “border” scepticism envisages the complexity of the interpretation given to the notion of border and its evolution in the context of the present-day phenomena of globalization and integration”<sup>50</sup>. In 2010, five years after the first issue, in the study *Eurolimes, where to?*,

<sup>44</sup> Idem, „The actors of Cross-Border Cooperation on the Romanian-Hungarian Border”, in *Acta Geographica Debrecenensis*, vol. XLVII, 2005, p. 244-265.

<sup>45</sup> Ioan Horga, I. Suli-Zakar (ed.), *Cross-Border Partnership. Whit special regards to the Hunagrian-Romanian-Ukrainian Tripartite Border*, Editura Universității din Debrecen/Editura Universității din Oradea, Debrecen/Oradea, 2010.

<sup>46</sup> M. Brie, Ioan Horga, „The Romanian-Ukrainian Cross-Border Cooperation an The European Instruments”, in A. Kruglasov (ed.), *Ucraina- Romania- Moldova: aspecte istorice, politice si culturale ale relatiilor în contextul proceselor europene contemporane*, vol. 3, Cernăuți, 2009, p. 302-318

<sup>47</sup> Ioan Horga, C. V. Țoca, F. Chirodea, *Evaluarea cooperării transfrontaliere la frontierele României*, Primus, Oradea, 2013.

<sup>48</sup> Idem, „Valorizarea cercetării științifice din mediul academic pentru evaluarea on-going. Evaluarea programelor de cooperare teritorială / transfrontalieră”, in I. Horga, C. V. Țoca, F. Chirodea, *Evaluarea cooperării transfrontaliere la frontierele României*, Primus, Oradea, 2013.

<sup>49</sup> A se vedea Ioan Horga, „Evaluarea on-going a Programului de Cooperare Transfrontalieră Ungaria-Romania (2007-2013)”, in I. Horga, C. V. Țoca (ed.), *Evaluarea cooperării teritoriale europene*, Editura Universității din Oradea, Oradea, 2013.

<sup>50</sup> Ioan Horga, „Why Eurolimes?”, in *Eurolimes*, nr. 1, 2006, p. 5.

Ioan Horga shows confidence in his interest shown towards this project: „Eurolimes will show an open interest”<sup>51</sup>. After ten years and twenty published issues he tries to redefine the essence and purpose of this project. *Still Eurolimes?*, the study opening issue no. 20, introduces us to the universe a mature project, which sits on a solid foundation and that rethinks the light of new realities.. “Eurolimes will remain an active platform for reflection on the European borders, in general, and on the EU’s borders, in particular, aiming to respond, rapidly, with knowledge products, to the fast changes of the European society. On the other side, Eurolimes, although it has been forced by the recent years’ realities to nuance its opinions regarding the future of the European borders, it strongly reaffirms that the EU will exist as long as it will have osmotic borders, that for very short periods of time can become closed, for needed adjustments, as it happened in the fall of 2015, under the pressure of the refugees’ wave. But the European Union will be forced to find solutions in order to keep its borders permanently open, in a space Eurolimes – type, appealing for this, among others, to the electronic surveillance of the traffic at its borders and even within it.”<sup>52</sup>. In *Eurolimes*, but also in various other publications, Professor Horga runs a series of conceptual analyses regarding the border. Under this category fall studies like: *Europe from Exclusive Borders to Inclusive Frontiers* (2007)<sup>53</sup>; *The New EU Borders: the historical and culturale Heritage* (2007)<sup>54</sup>; *The European Union External Border. An Epistemological Approach* (2009)<sup>55</sup>; *Europe: A Cultural Border, or a Geo-cultural Archipelago* (2010)<sup>56</sup>; *Europe between Exclusive Border and Inclusive Frontiers* (2010)<sup>57</sup>; *Europe: Internal Cultural Frontiers or Union Cultural Area* (2010)<sup>58</sup>; *The European Union External Border. A Conceptual Analysis* (2010)<sup>59</sup> or *Le frontiere europeee – espressioni dell’identità* (2014)<sup>60</sup>. “According to the same pattern, the *Eurolimes* paradigm designs, according to several researchers in the field, what we understand by “inclusive frontier”<sup>61</sup>, that is, the borders to which the European construction tends. The

<sup>51</sup> Idem, „Eurolimes, where to?” in *Eurolimes*, nr. 10/Autumn, 2010, p. 5-16.

<sup>52</sup> Ioan Horga, I. Suli-Zakar, „Still Eurolimes?”, in *Eurolimes*, nr. 20/Autumn, 2015, p. 18-19.

<sup>53</sup> Ioan Horga, D. Pantea, „Europe from Exclusive Borders to Inclusive Frontiers”, in *Eurolimes*, nr. 4/Autumn, 2007, p. 5-10.

<sup>54</sup> Ioan Horga, S. Șipoș, „The New EU Borders: the historical and culturale Heritage”, in *Actas del VIII Congreso „Cultura Europea”*, Pamplona, 2007, p. 545-557.

<sup>55</sup> Ioan Horga, M. Brie, „The European Union External Border. An Epistemological Approach”, in *Revista Română de Geografie Politică*, anul XI, nr. 1/2009, p. 15-31.

<sup>56</sup> Ioan Horga, Mircea Brie, „Europe: A Cultural Border, or a Geo-cultural Archipelago”, in *Eurolimes*, vol. 5/Spring, 2010, p. 155-169.

<sup>57</sup> Ioan Horga, M. Brie, „Europe between Exclusiv Border and Inclusiv Frontiers”, in *Studia Universitatis „Babes-Bolyai”*, Seria Europeea, vol.1/2010, p. 63-86.

<sup>58</sup> M. Brie, Ioan Horga, „Europe: Internal Cultural Frontiers or Union Cultural Area”, in *Moldoscopia*, nr. 3 (L), 2010, p. 123-143.

<sup>59</sup> M. Brie, Ioan Horga, „The European Union External Border. A Conceptual Analysis”, in A. Kruglasov (ed.), *Ukraine – Romania - Moldova; Historical, political and cultural aspects of their relations in the contemporary European processes context*, vol. 4, Chernivtsi, 2010, p. 204- 227.

<sup>60</sup> Ioan Horga, M. Brie, *Le frontiere europeee – espressioni dell’identità*, in *Transylvanian Review*, ISI Journal, vol. XXIII, supliment nr.1, p. 202-216.

<sup>61</sup> Kalypso Nicolaides, *Les fins de l’Europe*, in Bronislaw Geremek & Robert Picht (ed.), *Visions d’Europe*, Odile Jacob, Paris, 2007, p. 275-290; Jan Zielonka, *Europe Unbund: Enlarging and Reshaping the Boundaries of the European Union*, London, Routledge, 2002; Idem, *Europe as Empire*, Oxford University Press, 2006; Geremek, Bronislaw, Picht, Robert, *Visions d’Europe*, Paris, Odile Jacob, 2007.

main idea of the integration process is not to settle barriers, but to attenuate them. From this perspective, internal borders become more and more *inclusive* and less visible. Security and border traffic control are transferred to external borders that become more and more *exclusive*, more restrictive if we respect the logic above. Such a theory is valid up to a point. Internal borders do not simply become more open, more *inclusive*<sup>62</sup>; there is an integration process taking place in steps. On the other hand, we cannot consider as fully equal good and *inclusive/open*, or bad and *exclusive/close*. A simple example can confirm our hypothesis: in war areas, borders are relatively open to refugees<sup>63</sup>. However, we cannot conclude that we have an *inclusive* border “open just for pleasure” like European borders to which community integration tends as a model.<sup>64</sup> In general, the concept of border is associated with the *hard* physical border, a concept related to the barrier that can be crossed provided certain special conditions and requirements (visa to enter that country is the best example of a restrictive requirement in the case of *hard* border). On the other hand, a state can have *hard* borders with a neighbouring country, while having *soft*, open borders with another neighbouring country. A border can be both *hard* and *soft* at the same time. A state can eliminate visas for the citizens of a state while strengthening and reinforcing requirements in border control<sup>65</sup>. In the European Union, community institutions suggest that Member States should have *hard* external borders and *soft* internal borders. Besides, several authors consider that *hard*, *exclusive*, *close*, *sharp-edges* or *barrier* are equal. They are all associated with restrictions and strict control being characterised by the numerous conditions imposed to those intending to cross them. On the other hand, *soft*, *open*, *inclusive*, *porous*, *communicative* or *bridge* type borders remove transit restrictions by rendering traffic more flexible<sup>66</sup>. From another perspective, Charles Maier identifies three possible conceptual approaches of the border<sup>67</sup>: the first, „*positive and constructive*”, considered as a border providing political order and good neighbouring relationships; the second, „*negative and revolutionary*”, seen as an illogical obstacle against normality, peace and unity; and the third approach, „*dialectical and evolutionary*”, characterized by the dissolution of a border and the inevitable settling of another, yet not necessarily at the same level of formality<sup>68</sup>. For a long time, the concept of border has developed as an “intolerance axis” of nationalism and racism, of neighbours’ rejection<sup>69</sup>. Beyond physical border, irrespective of the analysed conceptual approach, either within or outside the European Union border, we identify other types of “borders”. We consider these borders as symbolic and ideological considering that, more often than not, they are not palpable. From Europeanism to nationalism, from ethno-religious identities to social chasms, the wide range of approaches on symbolic and ideological borders may continue in

<sup>62</sup> Gerard Delanty, *Border in Changing Europe: Dynamics of Openness and Closure*, in *EuroTimes*, vol. I, *Europe and Its Borders: Historical Perspective*, ed. Ioan Horga, Sorin Șipoș, Institutul de Studii Euroregionale, Oradea, 2006, p. 51.

<sup>63</sup> *Ibidem*, p. 50.

<sup>64</sup> Ioan Horga, M. Brie, „Europe between Exclusiv Border and Inclusiv Frontiers...”, p. 69.

<sup>65</sup> See Olga Potemkina, *A „Friendly Schengen Border” and Illegal Migration: The Case of the EU and its Direct Neighbourhood*, in Joan DeBardeleben (ed.), *Soft or Hard Borders? Managing the Divide in an Enlarged Europe*, Ashgate, Hampshire, 2005, p. 165-182.

<sup>66</sup> *Ibidem*

<sup>67</sup> Charles S. Maier, *Does Europe Need a Frontier? From Territorial to Redistributive Community*, in Jan Zilonka (ed.), *Europe Unbound: Enlarging and Reshaping the Governance and European Union*, Routledge, London, New York, 2002, pp 41-43.

<sup>68</sup> Horga, M. Brie, „The European Union External Border. An Epistemological Approach...”, p. 7.

<sup>69</sup> Gabriel Wackermann, *Les frontières dans monde en mouvement*, Ellipses, Paris, 2003, p. 28.

the context of a new fight against terrorism or of the implementation of an effective European neighbourhood policy. The physical border at the external limit of the European Union may “open” in time. Yet other types of borders may exist between people and communities. For instance, immigrants live within the European Union; by preserving their identity, they can create a world that “refuses integration” due to the particularities they develop. Thus, we can identify a split that may take the form of a symbolic cultural border sometimes even turning into an “external” border<sup>70</sup>. In addition to these works of conceptual and epistemological theoretical analysis about the European borders, Professor Ioan Horga runs analytical analyses on many kinds of borders as case studies. The approaches are, on the one hand, references to the evolution of relations between states / regions in the border area seen by analogy compared to historical realities. Historical and cultural heritage form a substrate that give special meaning to border areas, to the border directly<sup>71</sup>. The media played an important role in the democratization of societies in Central and Eastern Europe, and made its contribution to the transformation of border areas, in the sense/meaning that borders have<sup>72</sup>. The religious dimension of the border, where the border separate communities, ideas and religious currents, is analyzed and noticed as a peculiar reality of the area of Central and Southeast<sup>73</sup>. It is a region where ethnic-national identities often are accompanied by distinct religious identities. Historical perspective provides a picture of European cleavages in this area. Often overlapping ethno-national cleavages with the religious ones led to tensions and conflicts, which not infrequently have become a form of violent expression (as is the case of the Balkan area, recognized by periods of decay and violence, generated quite often by this overlap of religious frontiers than other types of borders - ethnic, linguistic, cultural, etc.). This perspective is added by the references of the cultural frontiers<sup>74</sup> and identity frontiers<sup>75</sup>. The economic frontiers<sup>76</sup> or the urban-community frontiers<sup>77</sup> are often placed against a complex approach

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<sup>70</sup> *Ibidem*, p. 7-8.

<sup>71</sup> Ioan Horga, S. Şipoş, „The New EU Borders...”, p. 545-557. Ioan Horga, S. Şipoş and I. Suli-Zakar, *Europe and Its Borders: Historical Perspective*, Editura Universităţii din Oradea, Oradea, 2006.

<sup>72</sup> Ioan Horga, „The role of Media in Changing the Meaning of the Borders”, in *Eurolimes*, nr. 3/Spring, 2007, p. 28-46; Ioan Horga, L. Şoproni, „The role of media in transforming the sense of borders of the World: The European Experience”, in P. Dobrescu, A. Ţăranu, A. Bărgăoanu (ed.), *Globalization and Policies of Development*, Editura Comunicare.ro, Bucureşti, 2007, p. 293-301; Ioan Horga, „Media, Identity and the Meaning of the European Frontier”, in D. Rolland, A. Landuyt (ed.), *Historiographies, politiques et territoires: la construction de l'espace politique européen*, l'Harmattan, Paris, 2010.

<sup>73</sup> Ioan Horga, S. Şipoş, „Considérations sur les frontières religieuses de l'Europe Centrale et de Sud-Est”, in *Eurolimes*, nr. 5, 2009, p. 5-13.

<sup>74</sup> Ioan Horga, Mircea Brie, „Europe: A Cultural Border...”; M. Brie, Ioan Horga, „Europe: Internal Cultural Frontiers...”; M. Brie, Ioan Horga, „Le frontiere culturali europeee: tra l'identita dello spazio europeo e le politiche comunitarie”, in S. Şipoş, G. Moisa, M. Brie, F. Sfrengeu, I. Gumenăi (coord.), *The Historian's Atelier. Sources, Methods, Interpretations*, Academia Română, Centrul de Studii Transilvane, Cluj-Napoca, 2012, p. 107-126.

<sup>75</sup> Ioan Horga, M. Brie, *Le frontiere europeee – espressioni dell'identità...*, p. 202-216.

<sup>76</sup> L. Şoproni, Ioan Horga, „The Economic Frontiers of Europe”, p. 5-6, in *Eurolimes*, Vol. 8/Autumn, 2009, p. 5-6.

<sup>77</sup> Ioan Horga, A.-M. Costea, „The Regional Policy in the EUMS from Central and Eastern Europe between Decentralisation and Recentralisation”, in *Debater a Europa*, nr. 12, janeiro/junho, 2015, p. 103-134.

which contains both the image of a space for communication, and of a space of fragmentation and cleavages<sup>78</sup>.

In conclusion, we note the rich scientific activity of Professor Ioan Horga by his openness towards themes less addressed in national and international literature, and by the methodological contribution that his work brings. His references to the evolution of relations between states / regions in the border area are landmarks in the scientific area of European Studies and, moreover, International Relations or Security Studies.

Being a historian at core, he has been finding meaning in the historical and cultural heritage which together form a substrate that give special meaning to border areas. In view of the above, the research infrastructure that he has created led to the diversification of approaches regarding the European space in general and the border space in particular. Professor Ioan Horga managed through a wide openness to interdisciplinary, multidisciplinary and transdisciplinary, to give his research a complex perspective and anecessary understanding of phenomena and processes current in the Europe of today.

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<sup>78</sup> See Ioan Horga, „Forms of Fragmentation or the European “Border Anxiety”?” in *Eurolimes* 20/Autumn, 2015, p. 108-123.

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## **VI. Book Reviews**



## CHOICES OF UNITY AND DIVERSITY FOR THE EU

*Cosmin CHIRIAC\**

**Review of:** „*EU à la carte?*” *Conference proceedings* of the Jean Monnet Seminar held in Malmö Sweden, between the 19<sup>th</sup> and the 21<sup>st</sup> of June 2016, Luxembourg: Publications Office of the European Union, 2016, ISBN 978-92-79-62015-7

After decades of expansion, institutional development and integration efforts, the EU is being challenged from several directions, both internal and external ones. The Jean Monnet seminar held in Malmö Sweden this June, just before the Brexit referendum, includes the texts of the presentations made with this occasion by the participants to the event, under a telling title, „*EU à la carte?*”.

The conference papers were presented in three sections, themed around subjects of great importance for the evolution of the European Union, all the papers confronting their subjects to the notion of differentiated integration. The first one, treating issues regarding the *Fiscal and Monetary Union*, which is by far the most consistent, is concerned with economic issues of the European Union. The second one brings together studies under the theme of *Borders and Defence*, and the third one is dedicated to the subject of the *Energy Union*.

As expected, some of the authors support the differentiated integration approach, here we can name Frank Schimmelfennig, Ton Notermans amongst others, while authors such as Roberto Di Quirico and Jarosław Kundera and others, argued for a more unified approach.

Frank Schimmelfennig's article opens the first section, introducing the subject of the conference. The author provides arguments for differentiated integration (DI) as a way for more integration, no matter what generated the differences in the level of integration, the EU treaties or the EU legislation. The causes for DI are identified in the enlargement of the union, and in the deepening and widening of European integration, showing that after initial resistance through opt-outs, more integration was generated (Schimmelfennig, 2016).

Mojmir Mrak, takes under analysis the concept of European economic governance, studies its past evolution, the economic policies that it proposed, responsibilities of the member states and surveillance and policy coordination aspects. The study outlines flaws in both the initial European Economic Community (EEC), such as weak crisis prevention mechanisms and no crisis management and resolution mechanism, as well as in the reformed one, arguing that it is still considered a work in progress, though there is no consensus on how to proceed. Some options for the future are proposed (Mrak, 2016).

In the paper with the title *A Europe Apart? The EMU, the New Economic Governance and the Future of European Integration*, Roberto Di Quirico identifies the



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political environment as the main driver for European integration for most part of the evolution of the EU. Gradually, economic reasons became the main driver according to the author, which generated a “fiercely competitive environment”. The author argues that *EU à la carte* is a bad solution for European integration, considering that there is a need for uniformity in the application of rules and rigorous supervision (Di Quirico, 2016).

Jean-Marc Trouille proposes a paper on the situation of Europe in times of challenges affecting the European Monetary Union (EMU). Initial flaws of the monetary project are presented, as well as long-term measures needed for a sustainable euro-area, also proposing recommendations on how to improve the EMU, showing the any delays exacerbate the economic costs. Though, as the author asserts, the crisis generated progress in the EMU, further improvements are deemed necessary, namely structural reforms, investment and innovation, cautious differentiated approach based on national particularities, and effective transnational governance and policy coordination (Trouille, 2016).

In the paper *The Fiscal Policy of the EU Countries in Time of Crisis*, Jarosław Kundera shows that EU countries have higher tax burdens than their greatest international competitors, which puts them in a vulnerable position, while also presenting internal EU disparities. The author argues for a shift from direct to indirect taxation in most EU countries, in order to generate economic growth (Kundera, 2016).

Ton Notermans, in the paper *Differentiated Integration for Growth*, analyses four aspects where the author considers a differentiated approach to be the proper one. They are market fragmentation and de-financialisation as opposed to a financial union, promotion of investment as opposed to EU fiscal policy capacity, an industrial policy, and a temporary exit mechanism, in order to solve fundamental disequilibria. He argues for an outcome-oriented union, considering that one lesson Europe forgot is that democracy and capitalism can coexist only if there are tolerable levels of inequality (Notermans, 2016).

George D. Demopoulos and Nicholas A. Yannacopoulos take under analysis the institutional framework of the Eurozone, arguing for one that would adjust monetary flows between debtor and creditor countries, mentioning the importance of making it desirable for each country of the EU, and for the whole EU at the same time (Demopoulos and Yannacopoulos, 2016).

Asking whether differentiated integration is the way for more Europe, Danuta Kabat-Rudnicka agrees that in certain cases opt-outs are helpful. Yet, considering that the interventions to keep the crisis in check were made outside of the treaties, the author argues that they need to be changed in order to impose a unitary approach further on (Kabat-Rudnicka, 2016).

Besides the many papers with an economic approach to the subject of the conference, two of them proposed subjects that take a security approach to economic aspects. Pierre Defraigne, who provided just an abstract for the subject of *Strengthening the Euro Goes through Building up a Common Defence*, argues that the EU, locked in the functioning of the markets dogma, needs more defensive integration and an industrial strategy through high technology in order, to improve its economic situation and to gain parity with the USA through one voice, in the frame of the NATO (Defraigne, 2016). The other paper, proposed by Nicolae Păun, presents how the security architecture of the EU changed in the face of the latest threats, generating a new strategy presented in the *Shared Vision, Common Action: A Stronger Europe* document. The author argues for a raised importance of the Black Sea region for both military and energy security considerations, also showing how Russia, from the position of a strategic partner turns more and more into a rival in the eyes of different European officials both at EU and national levels.

Furthermore, the author considers that more focus is needed on external threats, consequently solving internal threats (Păun, 2016).

Paulo Vila Maior presents his *Reflections on Academic Discussions about the Eurozone Crisis* presented in the first section of the current conference. The first thing he highlights is that most papers have a focus on economic issues, naming Roberto di Quirico's paper as an exception. Also, in his view, some of the papers seem to ignore the most recent academic efforts, also stating the obvious, which is that the EMU was flawed from the beginning. He also notes that many authors propose possible solutions for the analyzed subjects, though failing to do a reality check on their propositions: are they feasible or are they utopia, whether there is political willingness for the suggested reforms, and do they meet citizen expectations (Vila Maior, 2016).

The *Borders and defence* section includes five papers with more general and particular takes on security issues regarding the EU. Francisco Aldecoa Luzárraga presents certain aspects in the area of the defence strategies of the EU, such as permanent structured cooperation, the provisions of article 42.7 introduced by the Treaty of Lisbon, an equivalent to the provisions of the NATO Article 5, the threats that put pressure on the EU defensively, political agreements and more. Though the author argues for *differentiated integration*, he also considers the *EU à la carte* to illustrate the opposite of that, though the EUR-LEX glossary definition of the latter states otherwise (Communication department of the European Commission, no date; Aldecoa Luzárraga, 2016).

Emil J. Kirchner analyses the *Strength and Weakness of CSDP: Lessons From EU-China Security Cooperation*, while also emphasizing, where present, *à la carte* principles and categorizing in three different levels of intensity the areas of security cooperation between the EU and China, drawing from these lessons of success and failure (Kirchner, 2016).

Tomasz Kamiński and Marcin Frenkel draw from past Polish experiences and the unstable situation in Ukraine in order to find the best strategies for security in the eastern neighbourhood of the EU, which have as a central element, in the views of the authors, based on "The Giedroyc doctrine", the transformation of Russia from an autocratic and neo-imperial state into a prosperous and democratic one (Kamiński and Frenkel, 2016).

In the paper *Envisioning European Defence à La Carte*, Jan Joel Andersson goes through five different scenarios regarding the development of the European defence, stating that an *à la carte* approach is possible and that the five scenarios are not the only ones and various combinations are possible (Andersson, 2016).

The section ends with a paper entitled *An Economic View of Energy Challenges in the EU: From the Past to the Future* that presents EU energy scenarios and policy strategies. The author highlights issues in the levels of the prices for consumers and in the timeframe of the strategies, which need to extend for longer periods of time (Rabanal, 2016).

From the last section, only the first two studies tackle the subject of the *Energy Union*. Amelia Hadfield, considers the subject of *European Energy Security in the Age of Brexit*, proposing variable, rather than differentiated integration at the five components of the European Energy Union, arguing for governance as a central element. Bahri Yilmaz presents the situation of the import of primary energy sources in both the EU and Turkey, showing in both cases heavy reliance on it, with increasing demands. The paper presents the Turkey's ambition as an actor on the energy market and the constraints it meets both internally and externally (Hadfield, 2016).

The last three papers of this section are concluding papers for the entire conference, if we consider their subjects and content. In *Reconsidering Integration after*

*Brexit*, Antonio C. Pereira Menaut and Celso Cancela Outeda argue around the implications of the Brexit on the perception of differentiated integration since some countries are not in the EU though are participating in certain aspects of it or, on the contrary, some are in the EU, but are not participating in all aspects of the EU. Consequently, the author analyzes several different integration alternatives in history and argues for the continuation of the *EU à la carte* system (Pereira Menaut and Cancela Outeda, 2016).

Eduardo Perera Gómez in *À La Carte Europe? Neither New Under the Sun, Nor Definitive*, reviews the European crisis, identifying other aspects besides economic ones, arguing that it is not the first crisis that the EU had to face and considering, but also hoping, that it is most probably a temporary one, just like previous ones (Perera Gómez, 2016).

Adam Tyson closes the conference proceedings volume summarizing the topics presented in the different papers through two questions. They emphasise a few possible options: a non-negotiable EU core with other negotiable elements, a federal system or the 'à la carte' option. The possibility for a rollback on different aspects of integration is also deemed worthy of attention (Tyson, 2016).

The papers presented offer a good perspective on the issue of *differentiated integration*. The concept is applied to three different fields of activity that are essential for the future evolution of the European Union: economy, energy and security. The articles apply the main subject to past, present and possible future evolutions that are in one way or another related to the European Union. Both inside and outside EU matters are analysed. The participation, as reflected by the origin of the authors, was quite diverse, which guaranteed a rich array of perspectives on how should the EU shape its future: following the *EU à la carte* model, forging and imposing a *Menu du chef* one, or somewhere in between.

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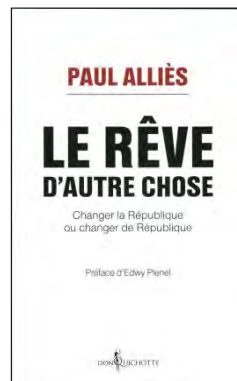
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## IN SEARCH OF A LOST REPUBLIC. TOWARDS A FRENCH SIXTH REPUBLIC?

Mariana BUDA\*

**Review of:** Paul ALLIÈS. *Le rêve d'autre chose. Changer la République ou changer de République*. Don Quichotte Edition, France, 2017. ISBN 978-2-35949-599-7

From some years now, the crisis in Europe is a reality. This crisis can be observed in all countries from Europe, at different levels and, of course, in different domains and activity sectors. There are countries who are confronting with economic issues, others with social issues, others with political, and the list could continue. It can be strange, but France, one of the greatest powers in Europe, a country that could be a model for others in many aspects, faces yet some years ago some political issues. One of the most important aspects is the desire, but also the need, for a new French Republic, as many actors from the political French class and from the civil society is reclaiming it. If that were to happen, we could talk about the France Sixth Republic.



It is known that, over the time, France went through different political stages, changing by now five Republics. All of them have been the result of violent crisis.<sup>1</sup> The beginning of the Republic in France starts in 1792, with the abolition of Monarchy. Officially, between 1792 and 1804 we can speak about the French First Republic. This period was characterized by the fall of the Monarchy in France and it lasted until 1804 under Napoleon. The form of the Government during the French First Republic changed several times.<sup>2</sup> The French Second Republic was the shortest in the history of France. It lasted from 1848 until 1852. During this Republic it was officially adopted the French slogan used nowadays too, “Liberté, Égalité, Fraternité”, because the tension between social and democratic republic was very obvious.<sup>3</sup> The French Third Republic was the largest one by now. It lasted 70 years, from 1870 to 1940. This Republic led to the formation of the Vichy Government. It was a period marked by many social reforms, desired by the people of the time.<sup>4</sup> The French Fourth Republic was the Republican government of France, between 1946 and 1958, governed by the

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<sup>1</sup> Håkon Tranvåg, “The French Fifth Republic: Against All Odds”, *Popular Social Science* (2013), accessed November 9, 2016, <http://www.popularsocialscience.com/2013/10/08/the-french-fifth-republic-against-all-odds/>

<sup>2</sup> “La Révolution Française. La législation de la I<sup>re</sup> République”, accessed November 9, 2016, <http://www.cosmovisions.com/ChronoRevolutionPremiereRepublique.htm>

<sup>3</sup> Larousse, II<sup>e</sup> République, accessed November 9, 2016, [http://www.larousse.fr/encyclopedie/divers/II\\_e\\_R%C3%A9publique/140712](http://www.larousse.fr/encyclopedie/divers/II_e_R%C3%A9publique/140712)

<sup>4</sup> Larousse, III<sup>e</sup> République, accessed November 9, 2016, [http://www.larousse.fr/encyclopedie/divers/III\\_e\\_R%C3%A9publique/140713](http://www.larousse.fr/encyclopedie/divers/III_e_R%C3%A9publique/140713)

fourth republican constitution. The French Fourth Republic was an era of economic growth and rebuilding of the national institutions and industry after the World War II.<sup>5</sup>

The French Fifth Republic is the last and current republican constitution in France. It started in 1958 and is the second largest republic of France, after the French Third Republic. It had 8 Presidents (the last one is still serving) and different type of constitution.<sup>6</sup> During the time, different characters from the media, from universities or even from political sector wrote and published articles or books about the need of a change of system, by passing now to a French Sixth Republic.

2017 is a year that marks presidential elections in France. There are voices who would like that 2107 marks the change of the Republic as well. One important voice in the French public space, who sustains this idea, is Paul Alliès. Law Professor and Researcher at the University of Montpellier 1 in France, politician and writer at the same time, Paul Alliès is leading the “Convention pour la 6<sup>e</sup> République”, which is *«une machine à transformer la République. C’est-à-dire à imposer des réformes dont la classe politique conservatrice ne veut pas.»*<sup>7</sup>

For sustaining his ideas, Paul Alliès publishes at Don Quichottes Edition an interesting and wide book called “Le rêve d’autre chose. Changer la République ou changer de République”. In its 400 pages, the author exposes all his theories and arguments about the need of changing the Republic in France. Deeply profound, the book is an incursion in history, international relations, and political sciences. He analyses situations and facts, people and events, discourses and promises, from the recent history of France, all this being related with the international scene, in European and global context. The analytical way of thinking of the author and the critical overview of the French present situation can clarify in the mind of every reader the actuality in France.

Writing the review of the book “Le rêve d’autre chose. Changer la République ou changer de République” is a hard and complicated mission. Even from the title the author expresses very clear his position. He thinks about so much time to another kind of Republic in France, that it is already like a dream, the dream to another thing. The subtitle is also very suggesting. A play of words in French, “Changer la République ou changer de République”, means that however you will take it, something has to change in France, either the way of government or the Republic, the country itself.

Without any doubt, the French Fifth Republic brought a lot of good things to the French people. An example that came now in mind is the law of decentralization which was declaring the region as territorial collectivity, along with the communes and departments.<sup>8</sup> This aspect makes us think about the borders and makes us see the efficiency of a regional

<sup>5</sup> Larousse, IV<sup>e</sup> République, accessed November 9, 2016, [http://www.larousse.fr/encyclopedie/divers/IV\\_e\\_R%C3%A9publique/140714](http://www.larousse.fr/encyclopedie/divers/IV_e_R%C3%A9publique/140714)

<sup>6</sup> Larousse, V<sup>e</sup> République, accessed November 9, 2016, [http://www.larousse.fr/encyclopedie/divers/V\\_e\\_R%C3%A9publique/140715](http://www.larousse.fr/encyclopedie/divers/V_e_R%C3%A9publique/140715)

<sup>7</sup> C6R, “Convention pour la 6<sup>e</sup> République”, accessed November 9, 2016, <http://www.c6r.org/qui-sommes-nous>

<sup>8</sup> Natalia Cuglesan, “30 Years of Regionalization in France. What Lessons for Romania?” in *The Romanian Journal of International Relations and European Studies. New Narratives for Europe*. Vol 2, no.1/2013-3014, p.114

structure.<sup>9</sup> But, at the same time, changing borders means changing the identity.<sup>10</sup> Will France change after changing the Republic? This is yet to see and to live.

From a structural point of view, the book “Le rêve d’autre chose. Changer la République ou changer de République” is divided in three big chapters. Chapter one, “Des institutions de la V<sup>e</sup> République à la nécessité de les reformer”, is divided in its own turn in others three subchapters, which explain the main idea of the chapter but also put in order the succession of events, as the reader could understand the problematic: “L’héritage du bonapartisme”, “Le *malgoverno* à la française” and “Les voies d’une révision constitutionnelle”. The second chapter, “De la « gauche de gouvernement » à sa présidentialisation dans la V<sup>e</sup> République” has other three subchapters as well. This part stresses the most important aspects of the left government in France. His critical spirit is obvious and his analyses are pertinent. “Le social-conservatisme”, “Les années renoncement” and “Les années reniement” are the three parts composing chapter two. In the last chapter of the book, “De désir de démocratie au dépassement de la V<sup>e</sup> République” there are four subchapters: “La rénovation des socialistes”, “L’invention des primaires”, “L’alter-démocratie” and “La question européenne”. In this last part, the discourse of the author is orientated to the need and the real desire of French people for another Republic, it means another form of government and another kind of institutions.

An important aspect to be mentioned is the fact that the majority of the analyses and texts from the book were published before on the virtual space, either on the on line journal Mediapart, where Paul Alliès has an important contribution, or on the website of the Convention for the Sixth Republic, where he is the president. That why, every text is dated with the exact date when it was written. That demonstrates the fact that Paul Alliès was always very present in the political life of France, commenting and analyzing facts, discourses of presidents and politicians, ideas, or simply editing his own opinions about the French realities of the moment.

The book represents his own plea for a change in France. With a very developed civic spirit, Paul Alliès is aware about the fact that a social dynamism can influence and exert a fluctuating movement on national decision-making processes,<sup>11</sup> and it is very important for the future of the country that, for example, one person, even it’s the president of the state, doesn’t have so much power as he has in this moment in France. His opinion is that at the present moment, France is not acting anymore as real democracy on the global stage, and he feels like a civil duty to note all the errors and to try, as he can, to change them.

The Introduction of the book is made by Edwy Plenel, who is one of the most known and appreciate political journalists in France at the present moment. Within his career he worked for the very famous journal *Le Monde*, but in 2008 he founded Mediapart<sup>12</sup>, an online journal published in English, French and Spanish. Knowing very well the French realities but

<sup>9</sup> Ioan Horga, “Regional and Euroregional Structures Efficiency in the Area of the New EU Border” in *Eurolimes. From Smaller to Greater Europe: Border Identity Testimonies*, vol 2, Ed. Mircea Brie and Kozma Gabor, (Oradea: Oradea University Press, 2006), p. 5-7

<sup>10</sup> Mircea Brie, “From Smaller to Greater Europe: Identity of the EU Eastern Borders” in *Eurolimes. From Smaller to Greater Europe: Border Identity Testimonies*, vol 2, Ed. Mircea Brie and Kozma Gabor, (Oradea: Oradea University Press, 2006), p.8

<sup>11</sup> Cristina Dogot, “How Permeable or Impermeable Could Be the Borders? Introduction” in *Eurolimes. Permeability and Impermeability of Socio-Economic Frontiers within European Union*, vol 13, Ed. Violaine DELTEIL, Cristina-Maria DOGOT, Kozma GABOR and Jarosław KUNDERA, (Oradea: Oradea University Press, 2012; Bruxelles: Editions Bruylant, 2012), p.5

<sup>12</sup> Mediapart, accessed November 9, 2016, <https://www.mediapart.fr/>

also the activity of the author, in view of their collaboration, he makes a beautiful description of the publication, inviting the reader in the world of Paul Allières. “*Son originalité est d’associer la compétence académique à l’engagement citoyen pour nous faire comprendre que la démocratie ne se proclame pas, qu’elle se vit, s’institue et se développe comme un écosystème complexe tissé de procédures et de protections, d’équilibres et de contrôles, d’institutions et de pratiques.*»<sup>13</sup>

Brief, having this book in my hands and reading it even before his official appearance in the libraries, was a great honor, but at the same time a big responsibility by writing a review. It is an interesting book, very concise, intense and pleasant to read. Maybe we should all be aware about the fact that “Une génération ne peut assujettir à ses lois les générations futures”<sup>14</sup>, meaning that a generation cannot oblige the future generations to follow their rules, and the civic spirit is always a good way to express our implication and devotedly to our country.

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<sup>13</sup> Edwy Plenel, “Préface” in *Le rêve d’autre chose. Changer la République ou changer de République*, by Paul ALLIES, (Don Quichotte Edition, France), 2017, p.11

<sup>14</sup> *Ibidem*, p.14

## INSTITUTIONAL DEMOCRACY IN THE EU

*Cosmin CHIRIAC\**

**Review of:** *Claudia Simona Timofte – Democrația la nivel European: democratizarea procesului decizional în sistemul instituțional al Uniunii Europene*, Editura Școala Ardeleană, Cluj-Napoca, Editura Eikon, București, 2016

In times when democracy is put under pressure in quite a few European countries, especially in Eastern Europe, Claudia Simona Timofte proposes a book about democracy in Europe, to be more precise, about democracy in European Union institutions. The subject is more than appropriate for the present times, because one of the discontents of many European leaders is that the more integrated the EU is, the less decision power is left to the Member States regarding what happens in their own back yards and the European construction seems to be less democratic in relation with the member states. No matter how honest or dishonest their concerns may be, it is worth knowing whether or not the EU construction, represented by the EU institutions, is a democratic and legitimate one and whether it represents the will of all the member states of the EU.



Though there is no introductory text and the choice for the subject is not explained, the justifications for it are self evident and can be found in the current evolution of the European Union, one that is challenged by internal and external tensions, but also throughout the book. The structure of the book is dictated by its key elements: democracy and EU institutions, and carefully constructed around them. Thus, the first chapter provides a brief and narrow, but not superficial, look into European history, while the second one explains the decisional process of the EU institutions. The third and fourth chapters bring together the two key elements of the subject in an effort to provide an answer to the main subject of the study, the democratic legitimacy of EU institutions. Thus, the third chapter presents a critical view of the EU decision process, while the fourth presents possible solutions towards a more democratic institutional framework within the EU.

As stated previously, the first chapter dives into the history of Europe, where the elements that bring Europeans together are found, such as democracy, civil law, and Christianity amongst others, and where the reasons for the evolution of Europe into so many different cultures, languages and states lie. This retrospective look concludes with following statement made by the author: “the idea of Europe appeared as the sole way to reconstruct [it] and keep the peace” (p. 24, translated) within this space that has been tormented by many disputes and conflicts. This brings us to the end of the Second World

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War. From this point on, the focus is turned towards international institutional constructions within the European space, whether or not they were part of the efforts to build a European union. This retrospective look reaches up to the year 2007.

The many facets of the decision process, as it unfolds in the EU, are presented in the second chapter of the book. The separation of the powers in the EU, the law making process and the many European institutions are presented in order to give a thorough understanding of the mechanisms that provide functionality to the EU. Whether or not they hold the attributes of democracy is central to this chapter, and three consistent subchapters cover elements significant from this point of view. The relation between the EU, the European Communities and the Member States, is one of the places where they are searched for, but not only. The position of the EU in the international system is also significant from this point of view. In order for the union to be relevant on the international scene, it needs to be able to be the voice of all the member states, and consensus is not always easy to obtain, if at all.

Further, particularities of the decision process and the subsidiarity principle are checked against the values of democracy, both of them raising concerns regarding the way in which the EU represent the interests of the Member States. In both situations, examples are presented in order to make the case.

The third chapter is a critical one, which has the main objective of identifying the *democratic deficit* in the institutional framework of the European Union. The legitimacy of the system is viewed from two perspectives: the governmental one and the communitary, the EU institutions having the task of being representative, at the same time, for the Member States, the National Parliaments and the EU citizens as well. The author shows that critics were raised against the lack of democratic constraints of important domains and that democracy is marked disfunctionally, also being defective in the way it implements some of the “basic values of democracy [, such as] equality and individualism” (p. 180).

As stated previously, the *democratic deficit* of the institutional system of the EU is the main subject of this third chapter, a concept for which the author looks at definitions in the speciality literature. The concept raises concerns both from the perspective of the national states that form the UE, fearing that they have too little control over the decision process of this construction. As the author notices, there aren't significant differences regarding the institutional mechanisms between the Treaty of Lisbon and previous ones, though, European democracy is specifically addressed, presenting the democratizing principles that are at the basis of the European construction, though some critics deem the advances insufficient, as the author shows. The chapter ends with the statement that “the democratic deficit of the EU should be judged in the light of a democratic ideal and not of national democracy” (p. 199, translated), and lists areas where improvements from this point of view are necessary.

The Deepening of democracy in the European Union is the subject of the fourth chapter, which begins by referencing elements significant to the evolution of the EU, such as its constitution, that was set aside for the moment, its institutional construction and the process of integration. One of the first elements under analysis, which stretches over the first two chapters, regards the individual. The European citizenship is addressed first, an initiative that raised concerns in different Member States over the erosion of national specificity, a concern addressed by multilevel citizenship. Many other aspects regarding the rights and obligations of EU citizens are also addressed. The other facet of the individuality analysed here is the representativity of the European citizen in the governing



bodies of the EU, concluding that participation of the social partners in the governing process has great democratic potential.

Institutional aspects are of concern in the next three sections, addressing democratic aspects of the functionality of the EU institutions, of the relation between the EU parliament and national parliaments and regarding the implementation of a European system of parties. European governance and the exceptionalism of the European law are addressed in the last two sections of the book, the latter leaving room for diverging opinions in different facets of European integration.

Though the EU did not have as a model the development of a state-like union, and the democratic values of the European construction were not of concern in the beginning, they were gradually introduced in future developments of the union, one that needed a reconsideration of its purpose and the current step in the evolution of the EU, the author finds that governance is the solution of the current evolutionary step of the EU.



## INCURSIONS WITHIN THE FRONTIERS OF EUROPEAN SPACE

Anca OLTEAN\*

**Review of:** Mircea Brie, Alina Stoica, Florentina Chirodea (coord.), *The European Space. Borders and Issues*, Oradea University Press & Debrecen University Press, Oradea – Debrecen, 2016, ISBN 978-606-10-1846-8.

The book *The European Space. Borders and Issues*, starts with a foreword written by the editors Mircea Brie, Alina Stoica, Florentina Chirodea, is opening with the idea of nationalism in present day Europe, that still persist, mentioning that it is dedicated to the activity of Professor Ioan Horga. His professional activity was highlighted by his quality of historian, expert in international relations, researcher and teacher, with a brilliant research in the field of international relations and security studies. Having the ability to see beyond the process of European integration, focusing both on general aspects, but also on particular cases, having in mind a historical perspective upon life and universe, professor Ioan Horga proved to be one of the most outstanding specialist of his time. Researcher and university professor, Ioan Horga had an important project named *Eurolimes*, an important publication of Euroregional studies of our department.



Florentina Chirodea in the article *Ioan Horga – Visionary, Professor and Researcher by Vocation* makes the portrait and life evolution of professor Ioan Horga that reached the young age of sixty years old. He finished the highschool “Horea, Cloșca and Crișan” from Abrud and the faculty years he spent in Cluj – Napoca, studying history profile, at the Faculty of History- Philosophy within Babeș-Bolyai University. After teaching at the “Înfrățirea” High School from Oradea, since 1990 professor Ioan Horga became teacher at Emmanuel Gojdu High school from Oradea and, in 1991, he got a PhD scholarship at University of Reims Champagne- Ardenne, France. On May 30<sup>th</sup> 1995, in front of a commission formed from renowned specialists, Ioan Horga defended his thesis on “L’Église gréco-catholique roumaine (uniate) de Transylvanie à l’époque des Lumières. L’évêché d’Oradea (1780- 1830)”. His permanent collaboration with the University of Oradea started in 1992, when he was nominated lector at the Faculty of History- Geography at the University of Oradea. In 2000, he was nominated assistant professor. Florentina Chirodea points out that professor Ioan Horga was invited to teach to the following universities and institutes: Reims, Siena, Nancy, Wrocław, Paris, Montpellier, Bologna–Campus Forlì, Coimbra, Salamanca, Rzeszów, Alicante, Bratislava, Banská Bystrica, Brescia, Venice, Kraków, Lublin, Prague, Hannover, Maribor. In 2005, together with Professor Istvan Suli Zakar, professor Ioan Horga put the basis of the

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Institute for Euroregional Studies Oradea – Debrecen, and brought his contribution to Phare and Jean Monnet Projects.

Mihai Drecin dedicated to professor Horga the article <<Horga – “moșul”>>, starting with the idea that Ioan Horga reached the round age of sixty years old, saying that he knows professor Horga since his student years and his early years as a professor at “Înfrățirea” High school from Oradea. Professor Ioan Horga was chief of promotion at the Faculty of History and Philosophy at the Babeș Bolyai University. Professor Drecin mentions the year 1989 and its opening to the West which gave professor Ioan Horga the chance to prepare his doctorate in West, at the University of Reims. We found professor Horga, later, in the ranks of the Faculty of History- Geography within the University of Oradea, professor since 2000, and leading doctorates in history since 2007 and in international relations and security studies (2008). Last, but not least, professor Ioan Horga wants to underline the quality of inhabitant of Apuseni Mountains, *the country of stone* as it was surnamed by geographers and wants to wish him long life, good health and several professional achievements.

Mircea Brie writes the article *The Vocation of Research: the European Space and the Study of Borders in the Scientific Work of Professor Ioan Horga*. Mircea Brie emphasises that the academic work of professor Ioan Horga comprises 200 of title of publications. A road opener and a founder of a school, professor Ioan Horga created a school of international relations and European studies at the University of Oradea. He created an institutionalized architecture of utmost importance. Thus it was created the Department of International Relations and European Studies and the Institute for Euroregional Studies – Jean Monnet Centre of Excellence. Professor Ioan Horga has also a vocation of researcher, his books *Europa luminilor, Europa secolului al XIX-lea or Relațiile internaționale de la echilibru la sfârșitul concertului european (secolul XVII-începutul secolului XX)*, are especially emphasised by his colleague, Mircea Brie. Another book where he tries to differentiate between national and European perspective is his book *European construction. Tradition, reality, perspective*. The research of professor Ioan Horga focusing on European Parliament, intercultural dialogue, multilevel governance, European neighbourhood policy, regional and Euroregional development in cooperation with the colleagues from the University of Debrecen, the topic of cross- border cooperation, the study of a variety of borders, are constant themes of reflection and research for professor Ioan Horga. Emphasising one more time the character of historian of professor Ioan Horga, making use of concepts such as interdisciplinarity, multidisciplinary, the research of Ioan Horga proves to be one of extreme complexity.

Part one of the present volume has the title *Historical and Political Realities in Europe* and starts with the article of Maria Manuela Tavares Ribeiro, entitled *Europe – Idea / Europe Integration Times. Spaces. Actors*. The author examines the relationship between Europe and “thinking Europe” and “integrating Europe”. Thinking Europe implies all projects of political and economic unity of the continent and to build Europe is to accomplish the European dream (Tavares, 2016: 69) through a complex process “federal”, “confederal”, “communitarian”. The analyzed period focuses on the years 1919-1992. The author identifies the beginning of the history of European integration that dates back in 1970s. (Tavares, 2016: 70) In the opinion of Tavares, three historiographical approaches were validated concerning the process of European integration: “federalist-inspired narrative, the inter-governmentalist vision followed by a more contemporary approach that sought to overcome the <<models>> and integrate the <<social>> dimension of the European integration process”. (Tavares, 2016: 70)

The author Maria Manuela Tavares Ribeiro focuses on the relationship between “federalism” and “historians”, asserting that federalist theories were especially encountered in Germany and Italy. (Tavares, 2016: 72) Among the most prominent federalists, she remembered Walter Lipgens, Wilfried Loth, Sergio Pistone, Ariane Landuyt and Daniele Pasquinucci of the University of Siena, Daniela Preda at the University of Genova, Piero S. Graglia (University of Milan) and Corrado Maandrino (University of Eastern Piedmont) (Apud Tavares, 2016: 73) Then the researcher Maria Manuela Tavares focuses on “the <<realistic>> discourse of the European integration”. (Tavares, 2016: 73) Amongst the “realists”, Tavares Ribeiro mentions professor Stanley Hoffmann from Harvard University, the British historian Alan Milward who focuses on the early years of European integration, the period 1945- 1951, the American political scientist Andrew Moravcsik, professor at Princeton University who made an excellent research starting more with the secondary sources, than with archival documents and who considers EU project, all in all, as a “success”. (Tavares, 2016: 75).

A special place is dedicated by the researcher Tavares Ribeiro to “the French school of international relations” (Tavares, 2016: 75) The author mentions Pierre Renouvin who wrote on the importance of “material forces” and “collective mentalities” in the process of European integration. (Apud Tavares, 2016: 75) Another great French historian of European integration quoted by the author is Jean- Baptiste Duroselle with two important works *L'idée d'Europe dans l'histoire* (1965) and *L'Europe. Histoire des peuples* (1990). The author points out that in 1980 the history of European integration was written by specialists in international relations among whom he remembers Pierre Guillen, Raymond Poidevin, Pierre Mélandri and Maurice Vaisse. Other important authors in the field EU economic studies and European construction were: Gérard Bossuat (1992), Eric Bussière (1992) and Sylvain Schirmann (2000). Other writers from the field of European construction were Pierre Gerbet, Gérard Bossuat and Marie Thérèse Bitsch.

Later Maria Manuela Tavares Ribeiro focused on “the Europe of the historians of European integration” pointing out a university achievement of contemporary history teachers supported by European Commission who organized a great “colloquium” in Luxembourg which to encourage historians’ research of European integration issues. A trilingual journal, published in English, French, and German was published after this initiative.

In the end of her study, the opinion of the author is that European integration is not a “linear process”, but “It is an immensely rich and complex history filled with different ideas, times, spaces, actors and forms that have converged or clashed throughout the 20<sup>th</sup> and 21<sup>st</sup> centuries”. (Tavares, 2016: 81)

Professor George Contogeorgis, professor of Political Science at University Panteion Athens in the article *De la nature de la crise occidentale. Une crise de transition de la monarchie électorale au système représentatif* starts his research by approaching the concept of the actual crisis that is, in his opinion a crise of transition towards a new phase. (Contogeorgis, 2016: 83) Contemporary times are, in the opinion of the author, characterized by the autonomy of the economy based on hard currencies and communication in front of states’ power and frontiers. (Contogeorgis, 2016: 83) But, as a paradox, even given be these circumstances, the state and society remain isolated. In economy and communication, technology acts like a vehicle, concludes the author. (Contogeorgis, 2016: 84)

The author focuses, then, on the topic economy and communication as parameters of cosmos of the planet, and stately emancipations. In the opinion of the author the trend to equilibrate the social and economic in the new Cosmo systemic world can not be made

in the ancient political system. (Contogeorgis, 2016: 86) The markets had become important components of the globalization process and the will of the society is almost absent in the new geopolitics. Contogeorgis thinks that this process of transition towards new forms of governance is a transition led by the occidental “avant – garde”. In this new geopolitical context Germany wants to dominate especially “economically” the new Europe and it is the attitude of other classic dominant European states to pose limits to German ascension. The author sees, in consequence, a rupture between society and economy when “economy passes somewhere in the future and the society rests enclosed in the framework of 18<sup>th</sup> century”. (Contogeorgis, 2016: 91) The conclusion of the author is that for achieving democracy, we have to pass to a transitory stage, namely the representation. (Contogeorgis, 2016: 92) It is necessary, in consequence, to pass to a representative political system. (Contogeorgis, 2016: 93) The people must evolve to a “society of citizens” that to become a partner of economic system in the equation of good governance and in order to achieve this is necessary “a conceptual revolution” where the general interest to be replaced by the common interest.

Professor Ion Zainea comes with the paper “Culture and Ideology in Romania during 1971-1972” underlying the fact that under communist times the literary and artistic creation was under the censorship. This means that all books and articles were closely supervised by General Directorate for Press and Publishing. The present study focuses on the years November 1971 and November 1972, all the newspapers of the country being analyzed with the exception of journals belonging to national minorities. (Zainea, 2016, 99) The author starts with the prose published in the newspapers, because several “epic, drama or aesthetic writings” were considered as debating negative practices of the 25 years of communist establishment, the author bringing several examples. Other incriminations were referring to “used allegory” banishing “political meanings with negative implications regarding the life of our society”. (Zainea, 2016: 101) Another category of prose put under censorship was the one considered as having “a minor theme, insignificant for the tribulations of the current man” and the author offers illustrative examples. (Zainea, 2016: 101).

Another category analyzed is the poetry. Three quarters from the total number of poetries were placed in the category “without any connection with reality” and the author gives relevant examples in this sense. The conclusion of the present study is that two major ideas were mentioned by the Directorate analysis during November 1971- November 1972, one was that the newspapers should focus on “militant literature” and the second was that aesthetic principles of Marxism should be debated in the literature.

Antonio Faur in the article “Endeavors to Establish the <<Cele Trei Crișuri>> in Oradea and Aspects of its activity (1990- 2000)” underlines the efforts that were made after the Romanian Revolution to establish a cultural life in Bihor County and, in this sense, he notes the initiative of Professor Viorel Four to create “Cele trei Crisuri” Cultural Foundation in April 1990. More information about the foundation and its activities revealed in local press was revealed in the volume dedicated to Professor Viorel Faur at his 65 years anniversaries. (Faur, 2016: 112) Later on, Antonio Faur focuses on the editorial activity of the foundation. After the Revolution, there were re-edited the numbers from April 1920 to August 1940 of the magazine “Cele trei Crișuri”. Antonio Faur mentions chronologically the books edited by the foundation between the years 1992- 1995. Historians from Oradea and Cluj – Napoca published several under the auspices of this foundation.

Alina Stoica published in the present volume the article “Culture and power in European Space”. The author focuses at first on the idea of “culture, religion and the idea

of European unity”, emphasizing the first beginnings of the delineations between Asian continent and Europe. The Greek and the Roman Empires are the first examples of unification by conquest of old and new territories. The author focuses on the opposition between “Roman civilization” and the “barbarian” world that dominated the ancient world. (Stoica, 2016: 124). For comparison, Alina Stoica quotes a member of Romanian Academy, N. Bagdasar that regretted the lack of his contemporans to search for European idea in history and to approach the European past as such, otherwise this error could lead to misinterpreting European past. (Stoica, 2016: 125) Alina Stoica, then, tries to answer to the simple question “What Christianity meant for European culture?” and her answer comes as simple as that, telling in fact all “Her very existence” (Apud Stoica, 2016: 126) Last but not least, Alina Stoica focuses on “European educational policies” that are today structured around the concept of “democratic citizenship” and “social cohesion”. The idea of cultural networks, that are in the service of European Union interest and that targeted States, regions and most of all, people, will make easier the target of European Integration, is the conclusion of this study.

Gabriel Moisa, in the work *Between Democracy and Totalitarianism. The case of Patriotic Union from Bihor County (1945- 1947)*, underlines the importance of Patriots’ Union in the fight for political ascension. The Union of Patriots joined the platform National Democratic Front supporting the Government of Petru Groza where it was represented by five ministers. Then, the author focuses on the activity of Patriots Union from Oradea, the organization being created on October 20th, 1944. (Moisa, 2016: 137) Gabriel Moisa gave informations about Union organization in Oradea, about its propaganda in press, after different political events revealed by the documents found in the local Archives. The conclusion of the author is that the trend was to eliminate all those that were not ethnic Romanians from the Union. (Moisa, 2016: 139)

Mihai D. Drecin in the article *Nicolae Iorga and Oradea* makes the portrait of the historian Nicolae Iorga underlying his relationship with the people of culture from Oradea. He makes several visits to Oradea and, second time, in 1938 in front of the audience of the Western Theatre he hold a conference, “For the defense of Western boundary” (Drecin, 2016: 149). The study is a plenary for the idea of Romanianism, idea so dear to the historian Nicolae Iorga, pleading for the autochthony of Romanian people at the North of Danube. Last but not least the paper focuses on “the ideas and calls of the conference from 1938, marked by the situation political of the time, are in concordance with the political realities of our times, the historian Mihai Drecin transmitting us his fears regarding the future of Romanians.

Professor Nicolae Păun in the paper “Sur l’économie et les politiques industrielles de Roumanie dans l’entre-deux-guerres”. The author underlines the potential for development of Romanian provinces existent in Romania after the First World War. Slowly, the economic evolution of the state change from the condition of an agrarian state with conservative nuances to industrial state. (Păun, 2016: 176)

Ludmila Roșca in the article “University Mission in the Knowledge Society” analyzes the concept of university and its socio-cultural model in the vision of modern philosophy approaching the writings of K. Jaspers, G. F. Kneller, E. Durkheim, James J. Duderstadt, K. J. Dougherty, R. Deem, etc. It is necessary, for contemporary integrative processes, a transition for less developed economies from outside EU or perhaps placed in its periphery, a passage from the traditional economy to our based on knowledge and this passage requires the integration of the paradigm of competitiveness, suggests the author. (Roșca, 2016: 197)

In the article of Gábor Kozma and Klára Czimre, entitled “*Effects of the Natural Environmental Components on Sports*”, the authors debate the bilateral relation between relief and climate on one hand, and sports on the other hand. (Kozma&Czimre, 2016: 208)

Mariana Buda in the article “*The Valencian Linguistic Conflict: Dialect or Regional Language? Instrument or Argument for the Catalans independence?*” shows that the dilemma between Catalan language and Valencia language spoken in Valencia, more and more people speak and write the Valencian in the detriment of its actual use. (Buda, 2016: 221)

The second part of the volume has the name “*European Borders and Integration Process*”. It starts with the article of Isabel Maria Freitas Valente entitled “*The Portuguese Outermost Regions and the 30<sup>th</sup> Anniversary of Portugal’s Accession to the European Communities*”. Although the term “region” was not very encountered in international relations of the years 1950 and the concept of centralized state was more prominent, nowadays the region seems to have become an “entity with political power”. (Freitas Valente, 2016: 225) As in the years 1980, Spain and Portugal gain access to European Community, some of their outermost regions gained important access in Atlantic and the author mentions here Autonomous Regions of Azores and Madeira and the Autonomous Community of the Canary Islands.

Melania – Gabriela Ciot in the article “Brexite Case – from Individual Idiosyncrasies to a Collective Answer” the author expresses her opinion that more and more the élites from Europe have to bring their contribution to the actual process of European integration. (Ciot, 2016: 245) Then, the author focuses on the problem of British contribution to the European Integration Project. Last but not least, the present study focuses on the cognitive approach of the process of decision- making and their cognitive map and idiosyncrasies.

Mirela Mărcuț in the article “*EU and Cyberspace – a Plea for the Fifth Freedom of Movement*” starts by an introduction talking about the evolution of European integration process and of single market, and, in the same time, the ascension of digital market. (Mărcuț, 2016: 266) Other subjects approached were the evolution of cyberspace of European Union, features of the Digital Single Market, and, last but not least, making a plenary for the freedom of movement of information.

Ana Maria Costea (Ghimiș) in the article “*Beyond the Minimum Common Denominator between the EU and Russia. Study Case: Ukraine*”, points out that the concept of “rationality” generates predictability concerning the case of Ukrainian crises and the attitudes towards it of EU and Russia. The author uses in its equations the next variables “geographical characteristic”, “historic relationship” and “the characteristic of the regional dynamics – crisis or peace”. (Costea (Ghimiș), 2016: 283) Then, the author focuses on the concept of rationality. These crises are a pressure for the European unity, concludes the author.

Constantin–Vasile Țoca and Bogdan Pocola wrote the article “*Leadership debate in the United Kingdom as a Result of the Brexit Vote*”. The authors point out that during the first beginnings of membership into EU but also 2016, the EU population was perceived as <<Euroscptic>>. (Țoca & Pocola, 2016: 295) The main parties in great Britain, at the elections of 2010 and 2015, were the the conservative party and labour party were the most dominant on the political scene. The debates between the two parties continued after the demise of David Cameroon, after the failure of <<remain>> campaign of UK in the Union. (Țoca & Pocola, 2016: 301).

Professor Istvan Suli-Zakar brings his contribution to the present volume with his article “The Social–Economic Reasons of the Hungarian Peripheral Regions’ Formation”.



The author points out that the origin of regional development dates back in the years 1960 because the rural regions were lagging behind the process of integration. (Suli-Zakar, 1996: 305) This regional development has in mind develops in the sense of evolving economic, cultural and living standard in the regional areal. The difference between the capital and its surroundings became more and more visible in Hungary. Professor Istvan Suli Zakar points out the communist forces from the time of Rakosi and Kadar when the solution for improving the economy of peripheral regions was considered the industrialization. (Suli- Zakar, 2016: 307) The opinion of the author is that “the future development significantly depends on the state, imitativeness and innovation – sensitiveness of the local society”. (Suli- Zakar, 2016: 309) The solution of regional development appears as a must in order to eliminate the poverty from the peripheries.

Professor Anatoliy Kruglashov in the paper “Ukraine – Romania Dialogue: Moving ahead from Distrust and Suspicions” emphasize the necessity of maintaining fruitful relations between Romania and Ukraine. Relationships of collaboration between the two countries are existent for ages. The taking over by the Soviets of Bessarabia and Bucovina are imprinted, unfortunately, in the Romanian memory. Romanians regard with fear their Ukrainian neighbors. (Kruglashov, 2016: 322) Concerning the Russian increasing interest in Ukraine, Ukraine must choose between integration into EU and cooperation with Russia. Rapprochement of Romanian interests to European Union is hardening the actual bilateral equation.

Radu Românașu, in the article “Intellectual Elites, European Spirit and Interethnic Cultural Collaboration on the Western Border of Interwar Romania. Case Study: The Main Editorial Concerns of the Great Cultural Reunion <<The Three Crișuri>>” in Oradea, emphasizes that *The Reunion* <<Cele trei Crișuri>> was founded in 1919, in Oradea. The activities of the *Reunion* had in view to print magazines and books by the leading personalities of the cultural life. The manager George Bacaloglu turned the review in an elitist publication. Each number was based on a specific topic supported by articles signed by prominent writers from across the country. (Românașu, 2016: 335) It was world-wide known magazine, in Europe and on American continent.

Luminița Șoproni in the article “European Integration and the New Frontiers of Europe” focuses on the concept of region as <<a growth nucleus>> and in the regional process, states the author, nation-state still plays an important role. (Șoproni, 2016: 347) In the opinion of the author European Union, “as a major regional bloc, with a well-built and clear external trading policy that integrates and sustains intra- Community economic policies.”

Mircea Brie in the article „Identity as Frontiers in Central and Eastern Europe. The case of the Republic of Moldova” brings up the concepts of *identities, borders, group community, frontier* applied in the areal of Central and Eastern Europe with a focus on the space of the Republic of Moldova. The author concludes that the Republic of Moldova is affected by Transnistrian crisis that hinders somehow Moldovan identity. (Brie, 2016: 375) Geopolitics of international relations, zones of influences of dominant powers of the region bring their influence on local identities that are subjected to a continuous oriented practice of change. Sometimes it intervenes potential obstacles between the given identity (identity by birth) and outside identity influences, namely ideological frontiers.

Part three of the volume has the title *Security and Cooperation in the Europe*. It starts with the article of Iordan Gheorghe Bărbulescu, entitled “Les Relations Dipomatiques et Consulaires comme Partie des Relations Internationales”. (Bărbulescu, 2016: 385) The author points out that consulates are usually more familiar to tourists than the embassies which are rarely arriving in contact with the most tourists. The honored

consulates have even less attributions being, in fact “de missions officielles d’un Etat dans un autre Etat, mais plutôt l’expression de la bienveillance privée et ou de l’intérêt de promouvoir l’image d’un Etat dans une autre Etat, sans pour autant répondre aux exigences spécifiques d’une mission diplomatique officielle.” (Bărbulescu, 2016: 392)

Ruxandra Emanuela Nuț and Adrian Liviu Ivan come up with the paper “Sami National and International Representation” mention the Saami minority group from Norway, Sweden and Finland which passed through a process of Norvegionalization, constituting themselves in national and international organization, (Nuț&Ivan, 2016: 400)

Adrian- Gabriel Corpădean, in the study “The Securitate/ Security – a Scourge against Romania’s European Intellectual Message” writes on the actions of Romanian Securitate against intellectuals and population from Romania. After the Revolution of 1989, the Security turned into a target, as a contested structure, hated by the population.

Dacian Duna, in the article “Normative Power Faces Great Power Politics. The European Union, Russia, and the Ukrainian crisis”, mentions the present-day challenges of the European Union such as the Ukrainian crisis, Brexit and the elections from United States. These had shown the limits of European governance in the region, the existing conflict between ideologies and the necessity that EU to have the capacity to settle its disputes. (Duna, 2016: 439)

George Anglițoiu in the article “Complex Impact of Insecurity on Business” writes that the contemporary epoch was characterized by globalization of terrorism and organized crime. The Islamic terrorism has as target the “Infidel” Western society, is the opinion of the author. (Anglițoiu, 2016: 458)

Edina Lilla Meszaros, in the article “The Historical Analysis of the Development of the Area of free Movement in Europe: from the Emergence of the Iron Curtain to Schengen”, mentions the free liberty of persons mentioned by European treaties such as the Treaty of Rome. This liberty was, in the first instance, a liberty for people working or studying in another country of the European Union. (Meszaros, 2016: 473)

Anca Oltean, in the article “The creation of the League of Nations” focuses her work on the following coordinates: “the consequences of the ending of the First World War”, “Woodrow Wilson and its role in the creation of the League of Nations”, “The treaty of peace from Paris. Reglementations and significations”, “The failure of the ratification of the Treaty from Versailles by USA”. (Oltean, 2016: 477-487)

Constantin Vasile Țoca, Eduard Ionuț Feier, Alexandra Radu, in the article “The impact of Romania – Hungary Cross Border Cooperation Programme 2007- 2013 on Bihar – Hajdu Bihar Counties”, state that the purpose of their analysis is to see the impact of Romanian – Hungarian territorial operational program that developed between the years 2007- 2013 and its implementation in Bihar- Hajdu Bihar Euroregion (see counties). (Țoca, Feier & Radu, 2016:501)

Vasile Cucerescu, in the article “EU Cross- Border Cooperation: Knowledge Alliances and Schools”, mention that their actual subject of research are the cross-border cooperation involving different institutions, centers of action, think- tanks, different association, useful networks, sources of further research and information such books, journals, funds, financed programs of the field. (Cucerescu, 2016: 522)

Polgar Istvan, in the article “Building the Borderless Europe. A historical overview of the Romanian and Hungarian Cross- Border Cooperation”, presents the obstacles and impediments of European integration with a focus on Central and Eastern Europe and regional development that harmonizes disparities between the regions in European Union.

Florentina Chirodea, in the article “The Role of Cross- Border Cooperation in the Creation of European Cultural Networks. The Hungary- Slovakia- Romania- Ukraine ENPI CBC Programme (2017- 2013)” focuses on the topic of cultural cooperation in Europe, having a long tradition and being influenced by the creation of European politic and economic community after the Second World War. The new means of communication influence the entire process.

Cosmin Chiriac in the article “Spatial Analyses and Representations in the field of International Relations. A brief overview” defines spatial analyses as “something that students in this field (n.n. See International Relations) are not really aware of so, in this paper, we’ll try to address this problem by discussing the territoriality of IR, by explaining the essentials of spatial analysis and by looking at the scientific literature of IR and Political Science that already employs such techniques”(Chiriac, 2016: 570)

Last, but not least, Cristina Maria Dogot, in the article “The beginnings of the EU in the Western Balkans: A Milestone of its International Role” mentions the concept of EU foreign policy that evolved with difficulty, but in spite of all this, EU became an international actor used to act for <<peacekeeping>>. (Dogot, 2016: 582)

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## FROM PHYSICAL TO VIRTUAL AND BACK

*Cosmin CHIRIAC\**

**Review of:** *Mirela Mărcuț – The Socioeconomic Evolution of the European Union. Exploring the Electronic Frontier*, Springer International Publishing, 2016

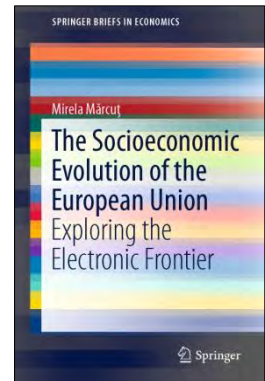
In many parts of the world, the society of today has moved into an era that includes Information and Communication Technologies (ICT), along with its benefits and drawbacks, into our everyday lives. This is no longer a history waiting to happen. Part of it is already behind us, and the effects of these technologies are already visible. The academic world of the social sciences has already given significant attention to how technology shapes society, and the book of Mirela Mărcuț adds valuable insights into the effects it has on the evolution on existing and new frontiers.

The foreword to the book is signed by Ph.D. Ioan Horga, who led the research of the author through the doctoral stages. The subject of that research is the basis for the current book, in which three topics that are of great interest in today's world, frontiers, the European Union, and socioeconomic evolution are put together with the desire to provide insights on the influences of the internet on our lives.

The introduction to the book, materialized in the preface, brings a few conceptual clarifications to some of the keywords that are essential to the research presented here, and justifies the choice of the geographical space that is used as a case study, the European Union (EU), a territory that has gone to great efforts in order to change its internal borders from lines of separation into spaces of congruence. Though the main topic is the electronic frontier, the research does not break away from the implications that the physical world bring to this matter, and as the author will show later on, the influences between the physical and the virtual world are mutual.

Another term that is essential to the study is the *Internet*, which normally carries with it two essential elements that make communication possible between any numbers of terminals: the hardware and the software. Here, its meaning is stripped of all the technical background, thus focusing on the activities that are possible within this infrastructure and making it, more or less, a synonym to expressions such as “the virtual world”, “the digital world” or the “online environment”. One other conceptual clarification refers to the *electronic frontier*, which extends the research on the influences of information technology to dimensions that are out of the reach for terms such as the *digital divide*.

The book is divided into four chapters, with a very clearly designed path of research. The chapters can be grouped, two by two, the first group providing the background for the last two. The first chapter provides the necessary theoretical input for



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the definition of the electronic frontier, while the second one prepares the ground for the presentation of specific electronic frontiers in the European Union.

As stated previously, the basis of the theoretical frame of the research is built in the first chapter, in which clarifications are put forward and links are highlighted regarding the keywords of the research, discussed in the context of globalization and technological evolution, as the titles of the first four subchapters clearly suggest. Their key elements are: frontiers, borders and the network society.

The effects of globalisation are looked at from two perspectives within the initial stages of the first chapter. Firstly, the effects on society, in general, are taken into consideration, the benefits and the disadvantages dividing researchers into proponents and opponents of globalisation, both of them acknowledged here. Secondly, the effects on the shape of the international structure are taken into consideration: state borders are subject to different levels of permeability, some arguing for their irrelevance in the current global context, as the author suggests (p. 3); others do not consider the borders at all, taking a sociological look at the world, in the shape of a network society, one that finds a territorial equivalent in the network of localities, which shape the distribution of population on the globe.

Further, the causes that brought new meaning to *frontiers* are discussed, differentiating them from *borders*, the former being more inclusive, however, not entirely devoid of the original meaning of a separation line, while the latter being exclusive and limitative. Through the openness that *frontiers* carry within their meaning, they are defined as “social processes”, being analysed in this manner, in some instances, further on.

Though the international structure is based on states, the socioeconomic world of today works in *networks of flows* and *spaces of flow*, and ICT provides the means of connection as it is outlined in the subchapter 1.3.

The first chapter circles around the concepts of frontiers and network society in order to get a grasp of what the electronic frontier is. The changes that affect our world, are reflected in the way it functions, and the way it functions is “reflected on frontiers” (p. 14). But it also creates frontiers that are only apparent from certain perspectives. In an effort to highlight the *theoretical foundation of the research*, but also to make the link to the next chapter, a first look is thrown at the initiatives that the European Union is taking in order to “develop [the] digital economy and to reduce digital disparities” (p. 17).

The European Union, due to its long experience in shaping and reshaping its territorial frontiers, through enlargements and by crossing new grounds of cooperation through integration efforts, is a very good choice for a case study. The second chapter leads us from a divided Europe, in the times that followed the 2<sup>nd</sup> world war, to the EU of today, one integrated on many levels, culminating with the *Socioeconomic Frontiers in the Lisbon Treaty*. Socioeconomic and territorial cohesion are the objectives that drive the Union from a *common market*, a term that outlines the existence of multiple markets, also implying the existence of state frontiers, towards an *internal market*, in which state frontiers become irrelevant. Another step towards the identification of electronic frontiers within the EU is the place of the digital economy within the internal market.

The theoretical ground for the analysis of the socioeconomic evolution of the EU, as it is influenced by the virtual world, is presented in detail in the third chapter. The electronic frontier is seen as a barrier, bridge, resource or symbol of identity, following O’Dowd’s logic<sup>1</sup>, and all these perspectives are explained herein. Thus, as a barrier, the

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<sup>1</sup> Liam O’Dowd, ‘The Changing Significance of European Borders’, *Regional & Federal Studies*, 12.4 (2002), 13–36.



electronic frontier is considered to manifest itself through access and usage limitations as well as through lack of skills, as “the frontier is in a constant interdependence with the territory” (p. 43-44), i.e. the physical world and its constraints (economic, infrastructural, educational, or legal, amongst others). The electronic frontier as a bridge, link, or connection is manifested from the network society perspective, the links or connections between the nodes that make it up being the frontiers in such a configuration. They are also seen as a resource as they offer the possibility for cooperation or for expansion, being at the same time economic, development and security resources. And lastly, the electronic frontiers can be seen as symbols of identity. The author finds criticism in the the speciality literature regarding the online communities and the very specific and limited way in which they connect (p. 58). Even though thorough attention is given to this perspective, it is not discussed separately in the fourth chapter of the book, where the electronic frontiers within the EU are discussed.

The fourth chapter puts the puzzle together. It begins with the evolution of ICT in the EU and how it shaped the electronic frontiers in the socioeconomic context. It does so, by looking at EU documents, such as bulletins and strategies, starting with the 80’s until the present day. They show that the Internet was, almost from its emergence, a part of the plans for the development of the EU. These documents show that, gradually, the importance of the ICT was growing. The emergence of an Information society was emphasized from the beginning, taking note of possible adverse effects and different social aspects. Further, they are acknowledged as an economic resource, becoming an important part of the future development of the EU, as the proposal for a single European information space shows. The importance of ICT is pushed forward by promoting investments and innovation. At the same time, the electronic frontiers are pushed forward more and more, ICT taking center stage as an important element in the economic evolution of the EU.

Further, three of the four perspectives mentioned before are analysed in separate subchapters: the barrier, axis or link and the resource perspectives.

The electronic frontier is “drawn”, at first, as a barrier between the real and the digital space, through figures of its diffusion in the EU as infrastructure in both the urban and rural environments, but also as population access to performant ICT infrastructure. Secondly, it is “drawn” as a barrier within the digital space. Figures considered significant from this point of view are those showing the percentage of persons never having used the internet, which will inevitably decrease over time, but also through indicators showing the diffusion of digital skills within the EU.

As axis or link, the electronic frontier within the EU is analysed through digital inclusion aspects. Societal aspects became important, and digital inclusion was pushed forward by different campaigns, promoting the usage of the internet and the development of digital skills where they are lacking. From this point of view, Member State efforts are considered essential and examples from a few member states are presented to support this. The link perspective is also shown by the emergence of movements that begin online and bring communities together, making a mark in the physical world. An example is the *Los indignados* movements in Spain. The creation of communities by economic agents is another example of the electronic frontier as a link.

As an economic resource, one important element is the creation of the Digital Single Market. Five strategic priorities are identified as key elements in transforming this electronic frontier from a barrier into a resource, priorities that include aspects regarding the development of the infrastructure, clarification of legal aspects and others in order to

facilitate the creation of the Digital Single Market, showing that the efforts must come from both the EU and the Member States. There is a clear positive evolution in this sense, more and more persons purchasing goods and services online, both from internal and external markets. Electronic frontiers are found also within the economic sector, one of them being geographic discrimination. One of the answers to these kind barriers lie in cross-border cooperation in the online environment. Further, another way of pushing the electronic frontier as an economic resource is identified in the promotion of a proper attitude towards copyrighted goods, as the internet became an important facilitator of piracy. Though there is a positive trend in this regard, indicators show that there is still a long way to go. Significant attention is given to different efforts in promoting digital competitiveness, pushed forward through Research and Development initiatives and through education programmes such as the Erasmus+ program.

The conclusions reiterate the essential elements of the electronic frontiers presented previously. In an effort to define the electronic frontier, the author takes the theories related to the different perspectives on frontiers, grounded in the physical world, and introduces them to the virtual world, adjusting their meaning to it, as the “electronic frontier shapes society and economy, but it is also shaped by them” (p. 51). What comes out of this is that the electronic frontiers are not a thing of their own. They are not defined simply but what happens inside of the “Internet”, in the sense given to it by the author. They are defined by the international state structure, by social and economic realities but, at the same time, returning the effects.

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## Transylvania: Cradle of Culture

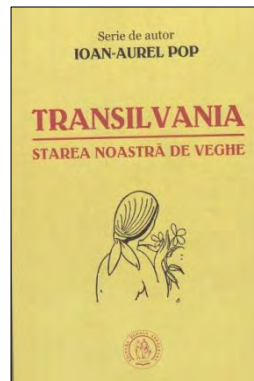
*Edina Lilla MÉSZÁROS\**

**Review of:** Pop, Ioan Aurel. *Transylvania. Starea Noastră de Veghe* [*Transylvania. Our State of Wakefulness*]. Cluj Napoca: Editura Școala Ardeleană, 2016, 298p.

This current work is another masterpiece of the famous historian, academician and writer, Professor Ioan Aurel Pop in the sequel of books written about Transylvania.

Mr. Ioan Aurel Pop understands by Transylvania not only a historical province, a Romanian region, but a symphonic word pleasing to the ear and a place interweaved of archaic and mysterious flavour, the study of which he can never grow tired of. For the author, Transylvania is a miraculous place, where the Eastern Romano-Byzantine and Slavic civilizations intertwine with the Western Latin and Protestant ones, also enabling the congenial coexistence of the traditional rural and the modern individualist urban spaces. Leafing through the pages of this book, we find out that since the early times this wealthy region has represented the bone of contention for many transiting nations, which have imposed a succession of various types of dominance putting their imprint on the province, turning it into a multicultural and multi-ethnic mosaic (Brie, Mészáros, 2015, p. 179) land. In historiographic terms, Transylvania is a region of high sensitivity, disputed by various ethnicities, each with their own historical claims and soreness, lamenting whether their secular fate of subdued subjects or the nostalgia of the glorious bygone times. In the author's view, guaranteeing the perpetuation of the personality of the region, of its historical dowry and of its traditional values is the precondition for the enhancement of its diversity, thus within these lines he commits himself to undertake an analysis as genuine as possible, based on objective facts mingled with inner feelings, impressions, beliefs and dreams.

Looking at the structure of the book, the author with the help of an imaginary time machine takes us back in time, briefly introducing to the laity this *wonderland* called Transylvania, emphasizing on the multitude of the prevailing apprehensions about it living in peoples' minds, being associated by some with the home of Dracula, as a result of the colourful imagination of the Irish novelist Bram Stoker, or with a land detached of stories with a well conserved natural habitat, as promoted in the descriptions of Charles, the prince of Wales. The distinguished author makes a succinct conceptual and historical assessment of the region in question, revealing to the reader the etymology of the word Transylvania (first mentioned in documents as Ultrasilvana), which contrary to many misperceptions does not date back to the antiquity, but to the 1<sup>st</sup> and 2<sup>nd</sup> centuries AD, meaning a territory situated "beyond the forest". This multicultural/multi-ethnic land, today home to circa 7 million people of which 75% are ethnic Romanian, 18% Hungarian



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(plus others, Roma, Slavic, German etc.) bears the historical mark of several peoples, starting with the Daco-Getae, Romans, Slavs, Romanians, Hungarians, Szeklers and Saxons, and boosts with a dithered past, its formation being totally different than that of other European regions. Transylvania is a region of cultural and spiritual interferences, cosmopolite as architectonic appearance in the modern era, multi-ethnic and multi-confessional since the most distant times of the Middle ages, one of its kind in Europe, where not just the Byzantine (Eastern) and Latin (Western) civilizations, but also the monuments in Romanesque, Gothic and Renaissance style exist side by side with those constructed in Baroque or Art Nouveau spirit. Apart from minor rivalries and disputes between these two civilizations, their coexistence was relatively peaceful, transforming Transylvania into a land of *tolerance*, where this concept meant different things for different people, within the society sometimes manifesting in antagonistic forms, such as acceptance/rejection, inclusion/exclusion, equalization/segregation, conferring to the region in discussion a *sui generis* character. Romanians being at the verge of distinct cultural and religious areas, situated and formed between the two civilizations, the Latin West and the Byzantine East, becomes the leitmotiv of the book, appearing many times during the study, emphasizing the specific character of Romanians, as a frontier nation.

As indicated before, in the introductive parts of the book, the author leads us through major events from the history of the Romanian people, starting the journey with a short assessment of the formation of the Romanian nation, highlighting the role played by Decebal, the Daco-Getae leader who gave proof of a courageous heart (Grumeza, 2009, p. 52) when fighting the Roman emperor, Traian, whose legions were superior in every aspect to Decebal's troops. In the ethno genesis of the Romanian people the Romanic conquest was of a major importance, as the Romanian nation was born as a consequence of the blending between the Daco-Getaes and the Roman conquerors, completed by the influence of the Slavic tribes arrived in the region after the 5<sup>th</sup> century AD. In the early Middle Ages, Transylvania was under the impact of the raids (Csikszentsimoni, 1935, pp. 16-17) of the Hungarians (Magyars), a nomadic tribe from Asia, which later under the rule of Stephen I, established a powerful Christian kingdom (Jancsó, 1931, pp. 32-33), continuously expanding its frontiers, mostly in its Eastern vicinity, thus conquering and annexing the territory "beyond the forest" (*trans silvam*). In order to consolidate their power and to better exploit the richness of the territory, the Hungarian kings decided to settle and colonise various foreign populations (Pop, 1997, pp. 155-158), in this manner contributing to the formation of a new ethnic/religious structure in the province, which had set the Transylvanian demographic landscape for the upcoming centuries. During this period, the Romanians, in spite of their numerical superiority, were labelled as *second class citizens*, sentenced to live a more isolated and modest life compared to that of the three privileged nations (Kürti, 2001, p. 14): the Hungarians, Szeklers and the Saxons. The life of the Romanian people from this time till gaining independence and unification, subscribes within a continuous strife for emancipation and liberation, and getting rid of the centuries old imposed subdued imprint. The preminent scholar renders special attention to the deciphering of the Romanian-Hungarian relations, emphasizing on their highly controversial and constantly changing nature, varying from conflicts, selfish attitudes and hatred, to conciliation, generous openings towards each other and acceptance. As disclosed by the author, the first written attestation of the contacts between these two nations was made by an anonymous chronicler of the Hungarian king, Bela III, in his work *Gesta Hungarorum* (The Deeds of the Hungarians) in the 11<sup>th</sup> century, also making reference to the Hungarian troops transiting a region "beyond the

forest” *ultra silvam*, abounding of richness, boosting with cultivated fields, salt and gold, inhabited by a people of a Slavic and Romanian origin. As highlighted by professor Pop, nowadays the bellicose historical clichés seem to fade away and the extremist manifestations from both sides are being silenced by the voice of reason, leading towards the humanisation of the bilateral relations. Besides the Hungarian impact, the Romanians from Transylvania were also greatly influenced by the Germanic people and the German models, brought in already in the Middle Ages by the Saxons colonised in the region by the Hungarian kings, and later by the Habsburgs, who have conquered Transylvania at the end of the 17<sup>th</sup> century and imposed a novel but rigorous administrative system.

Following the succinct historical initiation, in the upcoming parts of the work, the scholar extracts certain episodes from the pages of history with a major importance in the formation of the Romanian nation and culture in Transylvania, undertaking a more thorough analysis of these moments. Within these episodes, the historian commences the inquiry with an assessment of the Transylvanian School (*Școala Ardeleană*) from the period of the Enlightenment. The Transylvanian School was an enlightened cultural stream and a socio-politic emancipation movement affirming mostly from the second half of the 18<sup>th</sup> till the first half of the 19<sup>th</sup> century. The representatives of the Transylvanian School brought arguments in order to prove the Roman descent (Jancsó, pp. 361-362) of the Romanian people from Transylvania, and also contributed to the spiritual and political empowerment of the Romanian people subjugated over the centuries. This emancipation was also fostered by the passing of the territory under the suzerainty of the Habsburg dynasty, of which leaders, starting with Maria Theresa and Joseph II, through various reforms created propitious conditions for the affirmation of the Romanian nation.

Within this book the renowned historian pays a special tribute to Dimitrie Cantemir, labelled as the *second Romanian creator on continental scale* (after Nicolaus Olahus), who played a major role in enrolling Transylvania in the European cultural and scientific bloodstream of that era, having the famous German scholar, Leibniz not only as his colleague at the Berlin Academy, but also as his fellow of shared ideas. The personality of Cantemir is of an outermost importance in the Romanian historiography, as he was the first scholar who revealed to Europe the historical, cultural, ethnographic and geographic particularities of his country and of his people, by making a scientific study in Latin and in Vernacular languages.

Professor Pop makes a brief review of another event of great significance from the past, the Great Unification from 1918, which had contributed to the fulfilment of the centuries old craving of the people: to live as one nation within a state of their own, a yearning which had become true after the First World War, under the principle of self-determination promoted by the liberal internationalist (Steans, 2010, pp. 33-34) spirit emerged in the interwar period. Professor Pop perceives the Great Unification from 1918 as the topmost act of national deed ever accomplished by the Romanian people. Moreover, the notable author makes an assessment of the contribution of the Transylvanians in the creation of the Romanian Academy, “symbol of national spirituality, forum of recognition, space of fundamental research”<sup>1</sup> emphasizing various prestigious institutions from Transylvania, like ASTRA (Transylvanian Association for Romanian Literature and Culture of the Romanian people) created in 1861 at Sibiu. The idea of creating the Literary Society, the predecessor of the Romanian Academy in 1866 in Bucharest was received with enthusiasm by the prominent Romanian intellectuals of that era from Transylvania, among which we number Iosif Vulcan,

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<sup>1</sup> Official site of the Romanian Academy, <http://www.acad.ro/def2002eng.htm>, accessed 12 May, 2016.

founder of the famous journal, *Familia*, Timotei Cipariu, Gavril Munteanu, George Barițiu, Iosif Hodoș, Alexandru Roman etc.

Altogether, within this masterfully written book Professor Pop presents to us a Transylvania not only through historical or academic lens, but also through the imaginary vision of a reader and promoter of good literature with refined taste, as he is reminiscent of the remarkable Romanian poet, Mihai Eminescu, whose poems encompass a reconstituted and idealist version of the Romanian Middle Ages, sprinkled with a romantic flavour.

The notable historian finally postulates that the paramount of the Transylvanian tradition is a result of the legacy and life experience of all the people who have lived in this territory from ancient times until today. As revealed by him, in the past centuries Transylvania and its inhabitants formed part of different states, going through World Wars, totalitarian regimes, revolutions, but despite some confrontations they had always managed living together in relative peace and harmony. All these changes have constituted and consolidated an ethos in which dialogue and respect for alterity are essential, thus, it may be concluded that Transylvania is an oasis of multiculturalism and multi ethnicity, coexisting here since hundreds of years people with different nationalities and religious adherence starting with Jews, Orthodox, Roman-Catholics, Greek-Catholics, Lutherans, Calvinists, Unitarians, Baptists, Pentecostals etc.

As highlighted in the title Transylvania is cradle of culture for both Romanians and Hungarians (and to all major historical minorities), and moreover a genuine multicultural, multi-ethnic and multi-confessional role model for other regions of Europe and the world, and in the future it must continue to work in order to fructify the tradition of tolerance and peaceful coexistence.

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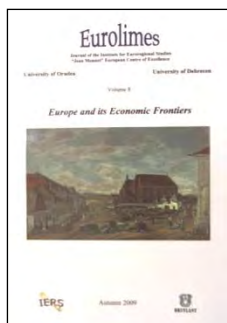
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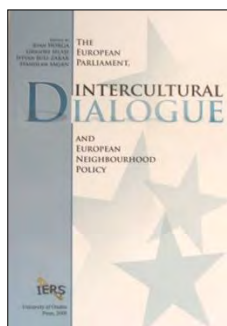


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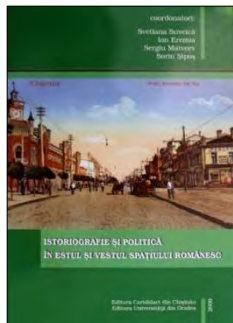


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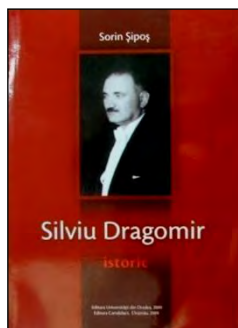
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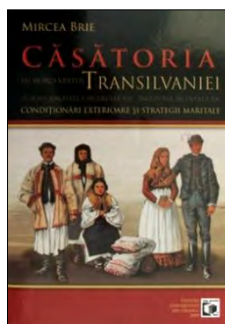
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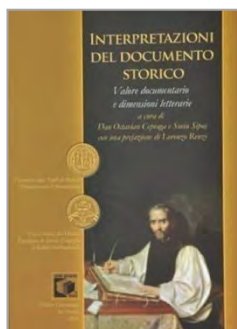
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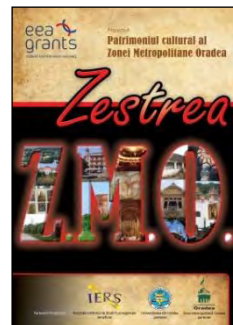


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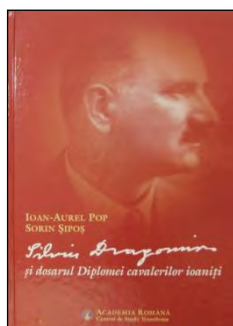
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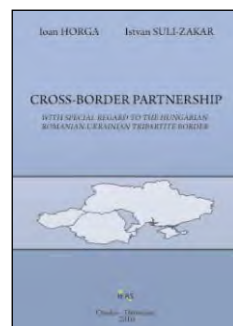
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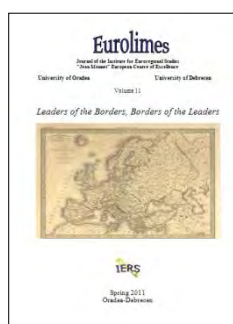


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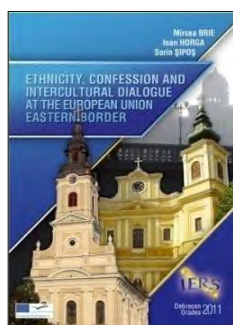


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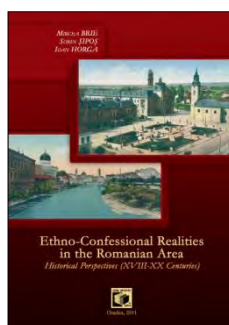


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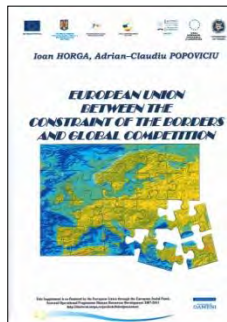
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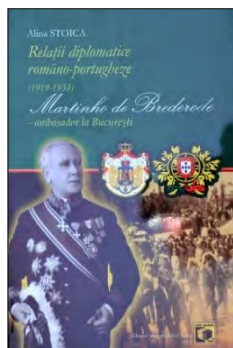
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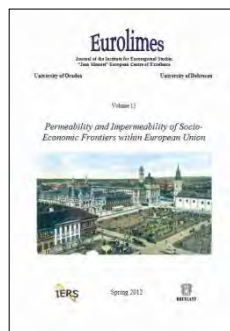


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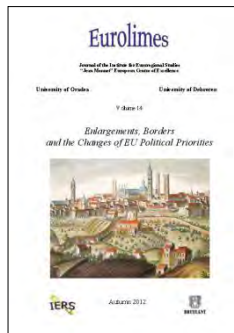
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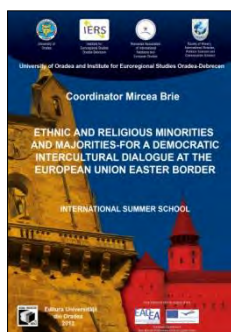
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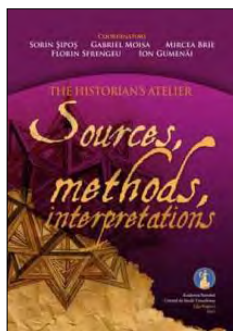


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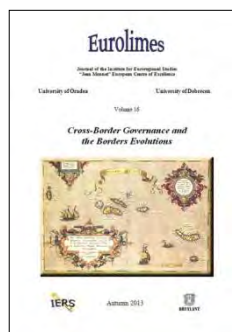


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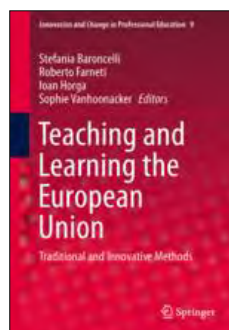


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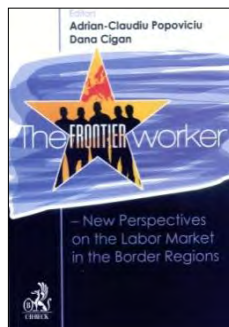
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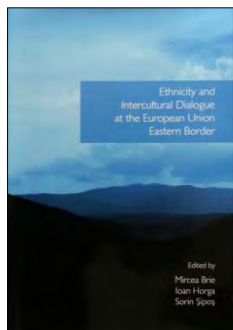
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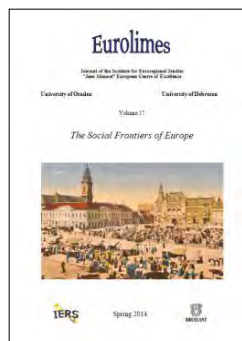


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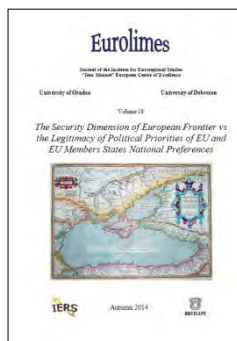


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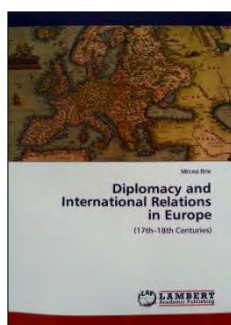


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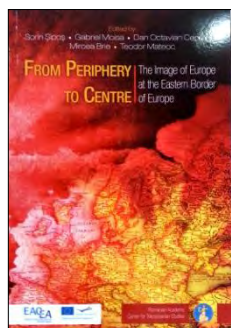
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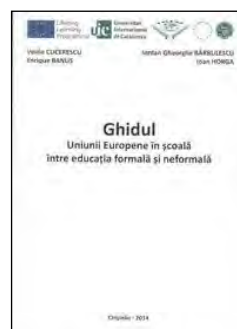
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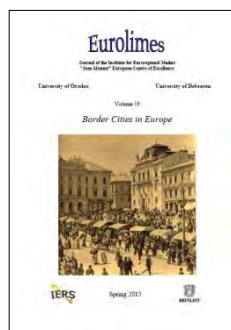


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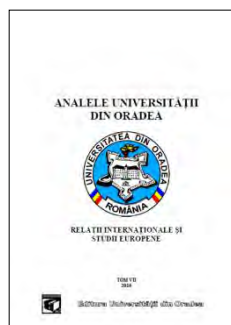
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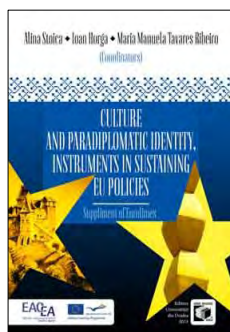


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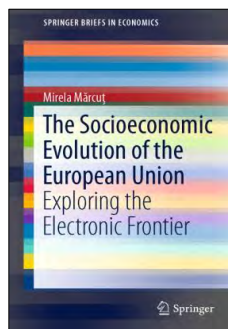


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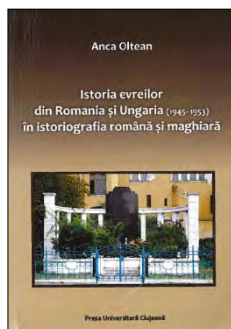
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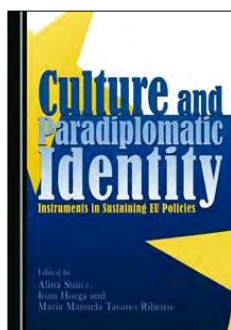
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