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Special Issue

Disregarded epistemologies in education?
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Disregarded epistemologies in education? Critical approaches to Sociologies and Histories of Education in Central and Eastern Europe: Introduction to the Special Issue[1]

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Abstract

This special issue takes stock of current developments in the critical study of sociologies and histories of education in the Central and Eastern European region. It demarginalizes the intersection of marginalized disciplines within the field of educational sciences that is dominated by psychological and pedagogical approaches within a marginalized region within a global and planetary context. In this vein, the special issue brings together contributions that engage with conceptualizing the social in education, epistemological inequalities, ruptures and continuities within the field of education and social reproduction, governance and social justice in education.

Keywords: sociology of education; history of education; Central and Eastern Europe; epistemological inequalities

Why this special issue?

Sociologies and histories of education from Central and Eastern Europe are doubly disregarded. On the one hand, within the field of education, they are pushed to the margins by psychological and pedagogical approaches that center the individual and their personal development trajectories and analyze systems in terms of their abilities to promote competency development. In these disciplinary contexts, the social and the temporal are background noise that may help in discerning the 'actual' educational

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questions. On the other hand, in terms of regional studies, Central and Eastern Europe is in turn a marginalized region for social research: beyond the Cold War and its follow-up epistemology of transitology, the region is now neither fully understandable with the epistemological apparati applied routinely to the Global North nor to the Global South. This special issue seeks to intervene in this state of affairs and in intellectual intersectional terms 'demarginalize the intersection' of these processes of marginalization (Crenshaw, 1989) by exploring the questions of time and social in education in and beyond the CEE region.

The marginalization of sociology of education within education is especially evident when examined through its place in the teacher training curriculum. For example, in Romania, after the end of state socialism in 1989, sociology became an integral part of teacher training. In the 1990s, the curriculum for initial teacher training included courses such as general sociology, family sociology, and sociology of education. Soon after, the sociology of education was included only as an optional course in the curriculum for initial training of secondary education teachers (starting in 2012) and was omitted from most universities' initial training for early and primary education teachers. Only recently, beginning in 2024, the new (envisioned) curriculum for initial training of early and primary education teachers reintroduced the study of the sociology of education; however, these changes have not yet been implemented. Romania`s case is not unique, despite its proven formative value (Ferguson & Carbonaro, 2016; Rockwell et al., 2019), sociology of education has been increasingly marginalized in initial teacher training curricula, as more output-oriented education has gained dominance (Doherty, 2013).

Nevertheless, sociologies of education from the CEE region have brought to the fore critical studies of upward and downward social mobility and educational trajectories (Árendás & Messing, 2022; Árendás et al., 2022; Durst & Bereményi, 2021, 2024; Bereményi et al 2024; Erőss, 2018; Tomoiagă & Safta-Zecheria, 2024; Szalai, 2014; Jecan & Pop, 2012), persistent educational inequalities (Tufiș, 2008; Hatos, 2008; Țoc, 2018; Bădescu, 2019; Gheba, 2021), ethnographic inquiries into childhood (Ulrich Hygum & Hygum, 2021; Hygum & Ulrich Hygum, 2025; Savu et al., 2020) and critical inquiries into policies, their transnational circulation and embeddedness in local conditions of possibility and power relations (Neumann, 2023; Wirthová, 2025; Solonean, 2023; Mitescu Manea et al 2021, Safta-Zecheria et al 2022; Ulrich Hygum & Hygum, 2023; Zentai 2014; Hosszu & Rughiniș 2020), alongside critical investigations of the nation in education (Neuman 2025; Piattoeva et al., 2024), transnational educational actors (Zakariás & Al-Awami, 2023) and studies of educational segregation (Toma, 2011; Messing, 2017; Borș, 2020; Hatos 2008; Costache et al, 2024) and gender inequality (Rughiniș et al., 2025), as well as contexts of learning in contexts of displacement (Neumann et al., 2025; Cook et al 2023; Cantat et al 2022; Feinschmidt & Zakariás, 2018) and social reproduction in contexts outside of schooling (Savu et al. 2020). Socio-material epistemologies have also grown in importance bringing critical perspectives to understanding practices in education (Iacob, 2025; Wirthová, 2022). Histories of

education in the region remain a small, yet growing field that employs a local (Deaconu, 2024; Zysiak, 2015; 2019) or transnational perspective (Gulczyńska et al. 2023), while critical perspective of the study of disability related segregation and inclusion policies in and through education is also a growing field (Bucur, 2026/forthcoming; Dinu, 2022; 2026/forthcoming; Safta-Zecheria, 2018; 2023).

Moreover, studies of the CEE region in a transnational and comparative sociological and genealogical perspective have been on the rise and the European Educational Research Associations, especially the Sociologies of Education (NW28), Social Justice and Intercultural Education (NW7) and Research on Citizenship Education (NW34) networks have been important venues for pushing these agendas forward. In Romania, the Romanian Association for Educational Research's (ARCE) network on Ethnography Education, initiated by Cătălina Ulrich-Hygum, as part of a larger team that includes the editors of this issue, has been a significant venue for pushing this agenda forward. Practices of transnational research beyond the boundaries of Europe through critical inquiries into democratizing transformations of higher education in Latin America (Ivancheva, 2023; see also the Ecosystems for Higher Education Inclusion project) have also been emerging in broad connection with the region's social and post-socialist intellectual traditions, complementing a research agenda on transformative practices (Cantat et al., 2022), disability inclusion in higher education (Trancă et al., 2022; 2024) and transformative learning relations starting from the university but going beyond it (Safta-Zecheria et al., 2020; 2021).

Yet, while these epistemological approaches are maturing into a field of growing transnational and transdisciplinary interest, they remain on the epistemological sidelines both in regional and disciplinary terms. In this special issue, we seek to bring them to the center. Moreover, since we have launched the call for papers, as the impact of austerity measures in Romanian education has increased, the teaching profession, as well as social measures in education have been under constant public scrutiny bordering on discreditation. Struggles over socio-material aspects of education have yet again come to the fore in a move akin to the debates surrounding the first wave of the Covid-19 pandemic crisis management policies (Safta-Zecheria et al., forthcoming/2026). Moreover, epistemological struggles over the national curriculum have yet again exposed inter-generational conflicts about learning, as well as educational inequities connected to socio-economic and gender related inequalities. It is a context in which we are more than ever in need of sociological and genealogical knowledge about education in the region.

From the call to the contributions: revisiting the agenda

The initial call for this special issue emerged from a growing unease with the ways in which educational research in Central and Eastern Europe has increasingly been shaped by psychologically and pedagogically informed approaches, often to the detriment of sociological, historical, and genealogical perspectives. We invited contributions that engaged critically with educational practices, policies, and settings in the region, with

particular attention to how the social is conceptualised in education, how epistemological legacies continue to shape research agendas, and how education participates in processes of social reproduction and social justice.

The response to our call was general and diverse, the articles assembled in this issue are grounded in a wide range of empirical settings and geographical locations across Central and Eastern Europe, including Romania, Hungary, Poland, and the Republic of Moldova, and span multiple levels of education, from early childhood and compulsory schooling to teacher education, higher education, and professional training. The studies are situated in diverse contexts, ranging from kindergartens in ethnically mixed communities and local schools embedded in specific territorial configurations, to national policy discourses, higher education governance frameworks, and academic publication infrastructures. Attending to these situated sites allows the contributions to trace how educational processes are shaped differently across institutional levels and locales, while remaining attentive to the broader political, historical, and governance conditions within which these settings are embedded.

Conceptualising the social in education

Several contributions respond directly to our invitation to reconsider how the social is conceptualised in educational settings, particularly against the background of the growing psychologisation of educational research and practice. Rather than approaching learning, professional training, or integration as individualised or technical processes, these articles treat the social as relational, and as institutionally mediated process. In doing so, they draw attention to the ways in which educational practices participate in the formation of subjectivities, collective identities, and ethical orientations.

Simona Adam's analysis of the intergenerational transmission of teacher habitus conceptualises the social as embodied and narratively sustained across generations. Drawing on autobiographical accounts of pre-service teachers raised in teaching families, the article shows how professional identities take shape through primary socialisation, everyday observation, and inherited representations of the teaching profession, rather than being produced exclusively within formal teacher education. This perspective unsettles individualised and meritocratic accounts of career choice that remain influential in contemporary educational research, foregrounding instead the social conditions through which vocational dispositions are formed and recognised.

Zsuzsanna Árendás, Vera Messing, and Agnes Kende similarly approach the social as an institutional and interactional accomplishment. Focusing on early childhood education in ethnically mixed communities, they examine how kindergartens function as sites in which middle-class norms are normalised and enacted through everyday practices of care, authority, and integration. Their analysis highlights how subjectivities and collective identities are shaped through boundary-making processes that are simultaneously pedagogical and moral, carrying ethical and political implications that

complicate instrumentalist understandings of education as neutral skills acquisition or socialisation into taken-for-granted norms.

Epistemologies in educational research

A second cluster of articles engages centrally with the epistemological questions articulated in the call, particularly those concerning the multiple legacies of state socialist and post-socialist educational thought, as well as the contemporary reconfiguration of educational research under conditions of datafication, performativity, and managerialisation.

Leyla Safta-Zecheria's historical analysis of late socialist Romanian sociology of education revisits debates on the "crisis of schooling" as they unfolded across the Iron Curtain. By examining how Romanian sociologists and futurologists engaged with global critical discourses associated with Coombs, Freire, and Illich, the article offers a situated account of how schooling was defended as a socially central yet reformable institution within state socialism. In doing so, it complicates post-Cold War narratives that frame socialist educational thought primarily through failure or ideological closure, and brings into view alternative epistemological imaginaries that continue to inform contemporary debates on education and reform.

Mihaela Mitescu-Manea's Actor–Network Theory - informed genealogy of teacher mentoring similarly foregrounds epistemological continuity and instability across reform contexts. Conceptualising mentoring as a contingent assemblage of legislation, professional discourses, institutional actors, and material arrangements, the article shows how past epistemic configurations persist and are translated within present reforms. This approach unsettles linear accounts of policy change and professional development, drawing attention to the temporal layering and material-discursive complexity of educational practices.

Dana Solonean's analysis of textbook reform in post-communist Romania places epistemology at the centre of educational reform processes. By examining how textbooks were mobilised as instruments for disseminating "legitimate knowledge" aligned with emerging neoliberal rationalities, the article shows how knowledge, authority, and expertise were reconfigured through market mechanisms. Her analysis also highlights the role played by Romanian education specialists in legitimising these transformations, pointing to the entanglement of epistemic authority and institutional power in moments of reform.

Radu Dumitrescu's bibliometric and critical analysis of medical education extends this epistemic critique into a domain strongly shaped by data-driven research cultures. Through an analysis of large-scale publication patterns, the study provides empirical evidence of how epistemological concerns such as uncertainty, reflection, and epistemic justice are systematically marginalised within performative research regimes. In making visible the absences and silences produced by dominant data practices, the article raises

broader questions about what forms of knowledge are rendered visible, credible, or irrelevant in contemporary educational research.

Social reproduction, governance, and social justice

The third set of concerns articulated in the call regarding social reproduction, power, and social justice in contexts marked by historical rupture, crisis, and reform finds strong resonance across this special issue. In these contributions, social reproduction is approached not only as a cultural process, but also as one shaped by governance arrangements, institutional differentiation, and political rationalities that structure educational opportunity and inequality over time.

Robert Avram's critical discourse analysis of austerity in Romanian education examines how crisis narratives and moralised scarcity discourses operate as modes of governance that legitimate budgetary cuts and policy restructuring. By framing austerity as inevitable and morally responsible, these discourses normalise the reproduction of inequality while narrowing the space for contestation and alternative educational futures, revealing the affective and moral dimensions through which policy decisions are rendered acceptable.

Ştefan Marius Deaconu and Alina Roiniță approach social reproduction from a structural and territorial perspective, analysing how educational inequality in post-socialist Romania is produced through the interaction of spatial configurations, institutional autonomy, and historically accumulated human development. Drawing on nationwide data from lower secondary examinations, they show that educational outcomes are deeply path-dependent, and that institutional differentiation, particularly between autonomous schools and satellite structures, reinforces divergence between localities even under comparable socioeconomic conditions. Their findings foreground governance capacity and institutional design as key mechanisms through which inequality is sustained and reproduced.

Anna Becker and Florin Salajan's comparative study of higher education governance in Poland and Romania situates these dynamics within a broader historical and geopolitical frame. Conceptualising governance as an epistemic regime, they show how evaluation infrastructures, language hierarchies, and internationalisation agendas function as filters of academic legitimacy, producing new forms of exclusion while marginalising locally rooted and alternative epistemologies. Their explicit engagement with epistemic justice connects questions of power, inequality, and recognition to the organisation and valuation of academic knowledge itself.

Disciplinary traditions, analytical genres, and epistemic visibility

While contemporary educational research and policy debates frequently foreground skills, competencies, innovation, and efficiency, the epistemic foundations of education, what counts as knowledge, how knowledge is constructed, and whose knowledge matters, remain surprisingly under-theorised. As Ungureanu (2024) argues, educational

policy and research over recent decades have progressively pushed questions of knowledge into the background, treating them as implicit or secondary to performative outcomes shaped by competency-based curricula, managerial and performative reforms.

Epistemic concerns are not peripheral but central to how education is practiced. Knowledge is not simply presented in research texts but is actively represented, framed, and made visible through specific discursive and epistemic practices as it reflects and challenges power relations and confers legitimacy to ways of knowing and transforming educational practice. This is why, our understanding of educational inquiry in this special issue is predicated on attending to how knowledge is produced, organised, and legitimised and enacted.

While this special issue is situated within the field of educational sciences, the contributions it brings together draw upon a plurality of disciplinary traditions, including several strands of critical sociology. These include Bourdieu-informed analyses of habitus, reproduction, and symbolic violence (e.g. Bourdieu, 1973; 1977), critical discourse and policy sociology (e.g. Fairclough, 1995), Actor–Network Theory (Latour, 2005), and critical epistemologies attentive to epistemic injustice and knowledge hierarchies (e.g. Fricker, 2007; de Sousa Santos, 2014), as mobilised across the articles in this issue. These traditions do not necessarily share the same conventions regarding what counts as analysis, evidence, or results; consequently, differences in disciplinary traditions are also differences in how knowledge is made legible to readers.

In qualitative research in education, analytical insights are frequently articulated through clearly delineated themes or discursive categories, supported by illustrative data extracts. Such forms of representation respond to dominant and often normative expectations regarding transparency, traceability, and methodological accountability. By contrast, much critical sociological work, particularly that inspired by policy sociology, governmentality studies, post-structuralist discourse theory, or macro-textual approaches to critical discourse analysis, mobilises empirical material differently. In these traditions, interpretation often unfolds through extended argumentative narratives, within which empirical excerpts function as moments of conceptual anchoring rather than as discrete, bounded "findings."

The articles gathered in this special issue adopt diverse strategies for presenting findings, ranging from thematic organisation to discursive, narrative, and argumentative structures, while remaining attentive to analytical coherence. In doing so, they make visible not only their objects of analysis, but also their underlying representations of what knowledge is and how it can be known.

Editorial reflexivity and intellectual traditions in the Romanian context

Engaging with these contributions has prompted us, as editors, to reflect on the norms of academic writing that shape our own fields and reading practices. Encountering unfamiliar analytical structures required a deliberate slowing down: rereading the texts, situating them within broader intellectual conversations, and allowing ourselves time to

inhabit different genres of sociological and historical writing. In this sense, the editorial process itself became an exercise of epistemic learning and even reconsidering our own assumptions about what constitutes knowledge in education.

This process also raised more uncomfortable questions about the literatures we tend to read and those we may read less often. To what extent are our engagements with sociology already mediated through educational frameworks, concepts, and methodological norms? As one colleague remarked during our discussions, educational research itself is frequently psychologised and positivised, even when it adopts critical or qualitative vocabularies, a tendency that has been widely critiqued for narrowing the epistemic and normative scope of educational inquiry (Biesta, 2007; 2010; 2014).

Several scholars based in Romania and working at the intersection of sociology and education exemplify alternative narrative approaches to analytical representation. The foundational contributions in Romanian pedagogy, such as those of Emil Păun (2006, 2017, 2022) illustrate how questions of knowledge, equity, and institutional purpose have long been debated within local and national intellectual traditions. Elisabeta Stănciulescu (1996), Traian Rotariu (2004) and Adrian Hatos (2006) contributed important overview works that together with the anthology of theoretical texts engaging with the sociology of education edited by Fred Mahler (1977) at the end of the 1970s make up the cannon of fundamental readings in sociology of education academic classrooms until today.

At the same time, empirical work that builds on close ethnographic study and sociological theorizing is giving rise to a growing field. The sociological framing of classroom interaction, equity, and educational processes found in the work of Cătălina Ulrich (2021, 2023) points to relational and contextual dimensions that extend beyond procedural coding, while Sebastian Țoc's (2016; 2018; 2020) analyses of class and educational stratification situate empirical patterns within structural and historical narratives. In a similar vein, Octavia Borș-Georgescu's (2018; 2020) research, grounded in the sociology of education and informed by ethnographic and macro-microsocial perspectives on pedagogical practice, foregrounds how educational inequalities are lived and narrated within everyday school contexts, expanding on national debates about access, agency, and democratic educational practices. Finally, Safta-Zecheria (2018; 2023) has looked at how education and biopolitics intersect in everyday life in post-institutional settings.

From agenda to collective intervention

By making room for the social, the authors` contributions enrich our understanding of education in CEE settings. We are being shown how, in a context of morally legitimized austerity and persistent educational inequalities, middle-class norms are normalised and enacted through everyday practices, beginning in kindergartens up until university, and shape even early representations of the teaching profession. Additionally, the authors demonstrate that recent educational discourses originate from both socialist ideas about

schooling, in terms of crisis and reform, and early neoliberal rationalities that reconfigure knowledge, authority, and expertise within the logic of the market.

In dialogue, the contributions collected here substantiate the core premises of the initial call while also revealing a shared concern that cuts across empirical sites and methodological approaches: the progressive marginalisation of epistemic and political questions in education. Whether examining habitus, institutional practices, policy discourse, reform instruments, professional education, or academic governance, the articles show how what counts as knowledge and whose knowledge counts is shaped by historical legacies, political rationalities, and institutional arrangements.

Rather than attempting to resolve these tensions, this special issue chooses to stay with them. The juxtaposition of different analytical genres, evidentiary practices, and writing conventions is not treated as a problem to be harmonised but as a productive condition for interdisciplinary dialogue. For readers more closely anchored in educational research traditions, attending to these differences may offer a lens not only for engaging with the contributions that follow, but also for reflecting on the often-unspoken norms through which qualitative (and quantitative) evidence is expected to speak, persuade, and ultimately count as knowledge.

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The Politics of Academic Legitimacy: Governance and Epistemic Justice in Poland and Romania

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Abstract

This article examines how higher education governance in post-socialist Central and Eastern Europe functions as an epistemic regime, shaping which forms of knowledge are legitimized and which are marginalized. Focusing on Poland and Romania, it traces continuities from socialist-era ideological control to post-1989 reforms framed around modernization, internationalization, and competitiveness. While such reforms dismantled overt political censorship, they introduced new exclusions through managerialism, bibliometric evaluation, and the dominance of English in scholarly publishing. Historical case studies, including the suppression of intellectual traditions under socialism and the marginalization of national-language scholarship in the contemporary period, illustrate how governance mechanisms act as 'epistemic filters.' Drawing on decolonial and critical epistemology frameworks, the analysis foregrounds the persistence of disregarded epistemologies, locally rooted, interdisciplinary, and community-oriented forms of knowledge excluded from institutional recognition. The paper argues that addressing epistemic injustice in CEE universities requires rethinking evaluative infrastructures, fostering multilingual and regionally relevant scholarship, and recovering marginalized intellectual traditions. By linking governance structures to the politics of knowledge, the study contributes to debates on epistemic justice in comparative education and calls for governance models that embrace plurality, linguistic diversity, and the democratization of academic legitimacy.

Keywords: academic legitimacy; governance; epistemic justice; Poland; Romania

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Introduction

In the Central and Eastern European (CEE) region, higher education has long served as a site of ideological negotiation, political control, and, increasingly, global adaptation (Gawlicz & Starnawski, 2018). Since the collapse of state socialism, universities in countries such as Poland and Romania have undergone far-reaching reforms intended to democratize governance, align institutional structures with European standards, and increase global competitiveness (Dobbins, 2017; Kwiek, 2012). These reforms, framed in terms of modernization, efficiency, and internationalization, have been well documented in the comparative education literature (e.g., Bleiklie & Kogan, 2007; Donina & Jaworska, 2024). However, less attention has been paid to their *epistemic* consequences: how governance reforms shape what counts as legitimate knowledge, which traditions are institutionalized or marginalized, and whose voices are authorized within the academic field.

This article examines the entanglement of governance and epistemic marginalization in post-socialist higher education through a comparative analysis of Poland and Romania. Building on case studies developed in Becker et al. (forthcoming) and Glava et al. (forthcoming), and extending the theoretical insights of decolonial and critical epistemologies (de Sousa Santos, 2014; Fricker, 2007; Connell, 2007), we argue that governance structures function not merely as administrative frameworks but as epistemic regimes. They allocate institutional visibility and legitimacy to particular forms of knowledge while excluding others, especially those rooted in local, interdisciplinary, or historically suppressed traditions. Although the analysis draws on historically grounded examples from Poland and Romania, the article is conceived as a theoretical intervention. Our aim is not to present an empirical study in the conventional sense but to develop a conceptual framework for understanding governance as an epistemic regime. The cases serve as illustrative anchors that help illuminate broader dynamics of epistemic marginalization and institutional change in post-socialist higher education.

We approach governance not simply as a matter of legal or policy reform but as a mechanism of epistemic filtering. Post-socialist transformations often reinforced existing hierarchies or introduced new exclusions, particularly through reliance on imported models of quality assurance, audit culture, and English-language publication metrics (Becker, 2026; Becker & Pentón Herrera, forthcoming). In this sense, contemporary governance reforms continue the work of epistemic marginalization initiated under socialism, albeit in different, arguably more obscure ways. More specifically, they do so not by directly censoring ideas but by shaping the evaluative infrastructures, funding dynamics, and language ideologies that determine which knowledges circulate and which are disregarded. As noted by Chankseliani and Silova (2018, p. 18), "the emphasis on social and moral dimensions of education appears to have visibly decreased, leading to growing concerns over declining education equity and persisting corruption in education."

By centering the notion of disregarded epistemologies, this article contributes to ongoing debates about epistemic justice in comparative education (jules et al., 2026). It calls for a shift from narrowly defined governance metrics toward an ethics of knowledge plurality, one that recognizes the long histories of exclusion and the structural conditions that continue to shape whose knowledge counts in post-socialist academia.

Historical Legacies of Epistemic Restructuring

To understand the contemporary configuration of epistemic hierarchies, it is essential to revisit the socialist-era transformations that reshaped the intellectual and institutional foundations of higher education in the region. The epistemic outline of post-socialist higher education in Central and Eastern Europe is deeply shaped by the intellectual and institutional architectures of the socialist period. In both Poland and Romania, the decades following World War II witnessed a deliberate transformation of the university from a relatively autonomous site of critical inquiry into an apparatus of ideological statecraft (Péteri, 1995). This transformation was not merely political or administrative; it extended to the epistemic: shaping the very ways knowledge is understood and produced. Knowledge production was thus reorganized around the principles of Marxist-Leninist orthodoxy, disciplines were restructured or dissolved, and intellectual traditions incompatible with the official ideology were erased or marginalized (Verdery, 1991; Connelly, 2000).

Recent historical scholarship further illuminates how universities in socialist Poland and Romania institutionalized particular configurations of authority, expertise, and participation. Hîncu and Zysiak (2023) show that despite ideological control, socialist knowledge production was not monolithic; it combined mass participation initiatives with specialized expertise, producing uneven epistemic spaces in which certain disciplines flourished and others remained ideologically constrained. Likewise, Zysiak's (2015) analysis of the post-war University of Łódź demonstrates that the early socialist university was shaped by negotiations among liberal academic traditions, social reformist ambition, and emerging socialist state agendas. These findings underscore that epistemic restructuring under socialism was not merely imposed from above but emerged through contested institutional practices, resulting in a dynamic that continues to shape post-1989 reform trajectories in both countries.

In Poland, the 1951 Law on Higher Education and the Act of December 15, 1951, marked the formal subordination of universities to a centralized ministry. These laws eliminated institutional autonomy, placing all aspects of academic life (e.g., governance, curriculum, and faculty/staff) under ministerial control (Sejm PRL, 1951). As Zysiak's (2015) case study of the University of Łódź illustrates, the implementation of socialist reforms was shaped by local institutional histories and academic actors who navigated the tensions between inherited scholarly norms and the new demands of a socialist state. Rather than a seamless Sovietization, the period was characterized by hybrid

arrangements in which pre-war intellectual traditions coexisted with socialist visions of mass education and ideological alignment.

Stachowiak-Kudła (2022) further observes that the evolving legal framework effectively erased the guarantee of academic freedom, restricting research to state-defined 'national interests.' The 1952 Constitution did not restore these freedoms, and subsequent legislation, such as the 1958 Higher Education Act, further entrenched ideological control. Article 1 of the 1958 Act mandated that "universities are actively involved in the construction and strengthening of socialism in the Polish People's Republic by conducting creative scientific research" (cited in Stachowiak-Kudła, 2022, p. 101), thereby consolidating the Minister's authority over academic content, institutional governance, and research direction.

Romania experienced a parallel, though in many respects more intense, process of epistemic engineering. The 1948 education reform law, modeled on the Soviet blueprint, dismantled private institutions and brought the entire education system under the control of the Communist Party. Academic content was revised to conform to ideological standards, while student admissions were subject to political and class-based quotas (Marin, 2018). One of the most emblematic cases of epistemic erasure is the dissolution of the sociological school founded by Dimitrie Gusti. Gusti's interwar connections and the political choices of some of his collaborators complicated their position in the new regime, but the early socialist authorities also viewed the school's empirical, community-focused approach as out of step with the demands of ideological certainty. As Golopenția (2014) shows, the dissolution of the institute and the dispersal, often persecution, of its members brought an abrupt end to this line of work. When sociology re-emerged in the 1960s, it did so in a different guise, shaped by the political and institutional priorities of the period rather than by any return to the tradition introduced by Dimitrie Gusti.

These reforms extended beyond the suppression of disciplines. They also reshaped the internal cultures of academic institutions. Trust was undermined by surveillance; collegiality was replaced by hierarchical command; and intellectual dissent was equated with political subversion. Promotion and research funding were tied not to scholarly merit but to ideological alignment (Tismăneanu, 2003; Kwiek, 2006). In this context, the university ceased to be a space for epistemic diversity and became instead a mechanism for reproducing an officially sanctioned worldview.

Yet alternative epistemologies persisted, often in marginal or underground forms. In Poland, the 'Flying University' (*Uniwersytet Latający*) offered dissident intellectuals a space to teach and circulate non-Marxist ideas, including Western philosophy, literature, and independent historical research (Pszenicki, 1979). In Romania, similar activities occurred in literary circles, private seminars, and religious communities, though often with less formal organization. Hîncu and Zysiak (2023) highlight that Romanian universities, much like their Polish counterparts, blended ideological expectations with forms of expert-driven governance. Although participationist rhetoric emphasized mass involvement, actual knowledge production relied heavily on centralized expertise and

narrowly defined disciplinary legitimacy. This uneven configuration helps explain why certain epistemic traditions remained marginalized even after the political transition of 1989. These dissident and community-based efforts preserved fragments of epistemic plurality, but their exclusion from institutional recognition meant that their influence on post-1989 reform was minimal.

The mechanisms through which epistemic disregard operated shifted significantly between the socialist and post-socialist periods. Under state socialism, exclusion was rooted primarily in ideological gatekeeping and institutional oversight: certain areas of research were eliminated because they appeared politically suspect, whereas others flourished when they aligned with state priorities. Yet this landscape was not uniformly closed. Historical scholarship also shows that socialist-era knowledge production operated within a multilingual and selectively internationalized environment. Translation flows and publishing practices in countries such as Hungary reveal that academic work circulated not only in Russian but also in German, French, English, Italian, and Spanish, with German retaining particular prominence throughout the socialist period (Karády, 2021). In Romania, academic mobility likewise fostered contact with multiple epistemic centers. As Hîncu (2021) demonstrates, successive generations of sociologists engaged in study visits, conference travel, and scholarly exchanges across both Western Europe and other socialist countries, drawing on French, German, Russian, and increasingly English-language literature. This uneven but persistent circulation underscores that socialist academia was linguistically and epistemically more plural than often assumed. The post-1989 shift toward English-dominant, bibliometric evaluation regimes thus represents a significant reconfiguration rather than a simple continuation of earlier linguistic practices.

After 1989, however, the basis for marginalization changed. Earlier contributions that had circulated across the region's multilingual scholarly networks were now evaluated through new regimes of value: English became the principal marker of 'internationality,' bibliometric systems structured visibility, and much pre-1989 work was dismissed as ideologically tainted or rendered invisible because it did not fit emerging evaluative infrastructures. Historical studies show that many socialist-era researchers had been internationally engaged through mobility and multilingual exchange (Hîncu, 2021; Karády, 2021), yet the new post-socialist system often repositioned these intellectual traditions as peripheral within global hierarchies (Starnawski & Warren, 2024). Thus, the mechanisms of exclusion shifted: epistemic constraints under socialism operated primarily through ideological and institutional oversight whereas post-socialist marginalization increasingly took linguistic, metric, and market-driven forms.

Crucially, the post-socialist period did not mark a clear epistemic break. While political pluralism and institutional diversification increased, the structural legacies of epistemic control were not dismantled. Instead, new forms of exclusion emerged, often under the banner of modernization or internationalization. Although critical and

community-based knowledge traditions had been pushed to the margins under socialism, their position did not automatically improve after 1989. The ambivalent epistemic configurations traced by Hîncu and Zysiak (2023) and Zysiak (2015) help clarify this continuity: post-socialist reforms interacted with earlier institutional logics rather than replacing them, allowing inherited hierarchies of legitimacy to persist within new managerial and metric-driven regimes. As a result, the university remained a site of epistemic gatekeeping; no longer through ideological fiat, but through metrics, rankings, and standardized evaluations (Smolentseva et al., 2018). Grappling with the epistemic legacies of socialism is not simply a matter of historical reflection; it is essential for understanding how present-day structures of knowledge production in CEE universities have been shaped, and how inherited arrangements continue to obstruct efforts toward epistemic justice. These legacies are not simply historical background; they form the epistemic context upon which post-1989 governance reforms were built. The next section examines how these reforms reconfigured earlier hierarchies.

Post-Socialist Reform and the Reconfiguration of Epistemic Hierarchies

The transition from state socialism to liberal democracy in the 1990s was widely interpreted as a rupture, that is, a moment when institutions would be restructured to reflect democratic, pluralist, and meritocratic values (Dobbins, 2011). In higher education, this transformation was driven by efforts to align national systems with the European Higher Education Area (EHEA), as promoted by the Bologna Process. Yet the actual impact of post-socialist reforms on knowledge production and epistemic justice has been far more ambivalent. While these reforms dismantled the overt ideological controls of the past, they introduced new mechanisms of exclusion rooted in managerialism, performance metrics, and international competitiveness (Kwiek, 2007).

In Poland, the 2018 Law on Higher Education and Science exemplifies the neoliberal turn in governance (Ostrowicka, 2022). Promoted as a tool for increasing university autonomy and research excellence, the reform concentrated decision-making power in the hands of rectors, introduced new evaluation regimes for faculty performance, and tied research funding to publication output in high-impact, often English-language, journals (Becker et al., forthcoming). Romania followed a similar trajectory, marked by university classification systems and performance-based funding that privileged institutions conforming to global standards (Gog, 2015). The National Council for the Attestation of University Titles, Diplomas, and Certificates (*Comisia Națională de Atestare a Titlurilor, Diplomelor si Certificatelor Universitare*; CNATDCU) has largely reinforced a metric-driven academic culture in Romania by incentivizing publications in Web of Science–indexed journals and imposing citation thresholds, especially in the social sciences and economics. This skewed the academic focus toward international, impact-factor venues, while research in the humanities (especially in Romanian or addressing national issues) became marginalized. As seen in political science, domestic journals have lost prominence because they do not meet international metric standards, pushing scholars

toward English-language, globally indexed outlets. This environment aligns with broader critiques of 'publish-or-perish' audit culture, where reliance on bibliometric metrics favors conformity and dissuades innovative or locally anchored scholarship (Andrei et al., 2016).

Problematically, the invocation of internationalization and modernization as reform imperatives often masks the persistence of epistemic stratification. Governance frameworks formally promote pluralism and autonomy, yet in practice reproduce hierarchies among disciplines, institutions, and scholars. Fields like education, literature, and regional studies are often relegated to the periphery of academic prestige, while elite institutions concentrate resources in English-language programs aligned with global labor markets (Donina & Jaworska, 2024). Post-socialist reform has thus produced a paradox: the institutional liberalization of higher education has not been accompanied by epistemic democratization. Instead, the legacy of centralized control has been replaced by a technocratic regime of control through indicators, audits, and rankings. As de Sousa Santos (2014) notes, the shift from overt ideological censorship to more subtle forms of epistemic invisibility may be less visible, but it is no less consequential, as it continues to marginalize non-hegemonic knowledge through bureaucratic and metalinguistic mechanisms.

To understand the present conditions of knowledge production in CEE, it is therefore necessary to interrogate not only the historical legacies of socialism but the epistemic effects of the very instruments of reform. This article argues that governance metrics, language policies, and institutional classifications function as gatekeeping devices that determine who can speak, what counts as knowledge, and which research is considered worthy of institutional support. These evaluative infrastructures have reshaped what knowledge becomes institutionally legible today, setting the stage for the linguistic and metalinguistic exclusions discussed in the following section.

Language, Legibility, and Epistemic Filtering

One of the most pervasive yet underacknowledged dimensions of epistemic exclusion in post-socialist higher education concerns the politics of language. Language functions not only as a medium of scholarly communication but as a gatekeeping mechanism that determines whose knowledge is legible within dominant academic regimes (Canagarajah, 2002). In Poland's and Romania's current higher education landscape, English has become the principal currency of academic legitimacy, with profound implications for epistemic diversity and justice (Duszak & Lewkowicz, 2008; Muresan & Nicolae, 2015).

The dominance of English in global academic publishing is often justified in the language of internationalization, excellence, and competitiveness and has subordinated local languages, methods, and epistemologies. As Canagarajah (2002) argues, English functions not merely as a medium of communication but as a gatekeeping mechanism that filters which voices and forms of knowledge are recognized in global academia. This

'epistemic filtering' privileges scholars who can access and reproduce Anglo-American norms of writing, citation, and framing (Lillis & Curry, 2010). In both Poland and Romania, such filtering is institutionalized through research evaluation systems that reward publications in international, English-language journals indexed in databases like Scopus or Web of Science, while undervaluing locally grounded, context-sensitive, or community-engaged scholarship (Duszak & Lewkowicz, 2008; Mironescu et al., 2023). This linguistic shift is not simply about translation or accessibility; it reconfigures the epistemic field by marginalizing traditions of thought, methods, and vocabularies that do not align with the dominant linguistic and conceptual paradigms (see also jules et al., 2026). The use of English often entails the use of Anglo-centric theoretical frameworks, citation networks, and stylistic conventions. As Mignolo (2011) and de Sousa Santos (2014) note, such forms of knowledge production risk reinforcing epistemic coloniality, where local knowledges are either excluded or assimilated into Western paradigms under the guise of universality.

Thus, language, in this context, is not merely a communicative tool but an epistemic filter that determines which forms of knowledge are institutionally legible. As Phillipson (1992), Skutnabb-Kangas (2000), and Delpit (2006) have long argued, linguistic hegemony in education produces structural inequalities that affect not only what is taught but how knowledge is valued. In higher education governance, this manifests as a double exclusion: scholars working outside dominant language frameworks are both materially disadvantaged and epistemically delegitimized.

This regime of legibility is further compounded by digital and infrastructural asymmetries. Access to high-impact journals, international conferences, and global citation networks is unevenly distributed, reflecting entrenched geopolitical hierarchies in knowledge production (Altbach, 2002). Scholars in semi-peripheral systems such as Poland and Romania may face additional barriers including high article-processing charges, restrictive travel funding, and limited institutional support for open-access dissemination. The linguistic politics of higher education are therefore inseparable from its political economy: the push for 'global visibility' frequently aligns with the marginalization of epistemologies that do not easily conform to the dominant publication formats or commercial logics of the international academic market (Soler & Kaufhold, 2025). The consolidation of the scholarly publishing industry into a small number of multinational corporations has intensified these dynamics, creating 'oligopolistic conditions' in which English-language journals command disproportionate prestige, control access to scholarly legitimacy, and extract profits from publicly funded research systems (Larivière et al., 2015). As Hyland (2015, p. 2) notes, "academic publishing has gradually extended its reach to become a global enterprise, increasing its outlets and profits, and tightening its grip on higher education." The result is an epistemic environment in which linguistic hegemony, market concentration, and infrastructural inequality intersect to reinforce existing hierarchies of knowledge and perpetuate the invisibility of locally embedded scholarship. Thus, efforts to promote internationalization

in CEE higher education, however well intentioned, often reproduce epistemic exclusions under a new guise. They reward linguistic and cultural conformity while sidelining local languages, alternative research traditions, and situated epistemologies. In so doing, they perpetuate the historical dynamics of disregarded epistemologies that this article aims to foreground.

We further argue that addressing the politics of language is central to any meaningful effort toward epistemic justice in higher education. Language is not a neutral medium for scholarly exchange; it is a structuring element of academic legitimacy, shaping who is heard, what is recognized, and how knowledge circulates (Becker, 2021). Recognizing this requires moving beyond token acknowledgements of multilingualism to actively reconfiguring the evaluative infrastructures that sustain linguistic hierarchies. This involves revisiting research assessment frameworks, diversifying publication venues, and creating institutional incentives that value scholarship produced in national or regional languages, as well as in collaborative, community-based, and non-traditional formats (Becker, 2024). Without such systemic interventions, the rhetoric of 'international excellence' risks functioning as a mechanism of epistemic erasure, consolidating dominant epistemologies while marginalizing those embedded in local histories, cultures, and social needs. A genuine reform agenda must therefore see linguistic diversity not as an obstacle to global engagement, but as an essential condition for a more plural, equitable, and intellectually vibrant academic field. The following section considers what is needed to imagine epistemic plurality beyond such regimes.

Toward Epistemic Plurality in Post-Socialist Academia

Because governance structures have long functioned to marginalize particular forms of knowledge, in both the socialist and post-socialist eras, higher education in Central and Eastern Europe faces a challenge that extends beyond institutional reform to the restoration of epistemic diversity. As de Santos (2014) reminds us, the struggle for *epistemologies of the South* is inseparable from the dismantling of 'epistemicides,' that is, the structural erasures of knowledge systems, that persist in the aftermath of colonialism and authoritarianism. In CEE, these erasures are historically rooted in socialist-era ideological control and have been reconfigured in the neoliberal reforms of the post-1989 era (Dobbins & Kwiek, 2017). The task ahead is to confront these long-standing exclusions and to create governance systems capable of sustaining multiple, coexisting knowledge traditions.

Addressing the historical and contemporary marginalization of alternative epistemologies requires moving beyond rhetorical commitments to internationalization, autonomy, and excellence toward a more substantive politics of epistemic plurality. This begins with a critical rethinking of the evaluative infrastructures that define academic recognition. Fricker (2007) introduces the notion of testimonial injustice, which occurs when a person's credibility is unjustly reduced because of identity prejudice. Such prejudice, based on characteristics such as race, gender, class, or place of origin leads

others to give less epistemic weight to the their testimony than it deserves, producing both ethical harm (undermining the person's status as a knower) and epistemic harm (obstructing the circulation of knowledge). Fricker distinguishes between isolated instances and systematic patterns embedded in social structures, noting that her framework focuses on credibility deficits rather than excesses. In the CEE higher education context, national-language scholarship, locally grounded methodologies, and regionally specific research agendas are often treated as less credible within global academic regimes dominated by English-language publication and Western methodological norms (Cerwonka, 2012). Such structural prejudice systematically undervalues the testimony of certain scholarly communities, limiting their institutional recognition, funding opportunities, and impact.

A second pillar of epistemic plurality is sustained institutional support for multilingual, transnational, and intercultural scholarship. As Kiramba (2018) and Becker (2023) demonstrate, language ideologies operate as powerful mechanisms of epistemic exclusion, privileging certain linguistic repertoires as 'legitimate' while subordinating others. Although Kiramba's study focuses on multilingual classroom settings in Kenya and Becker's (2023) on Switzerland, the underlying dynamics are mirrored in higher education in Central and Eastern Europe, where English occupies the apex of the publication prestige hierarchy. This hierarchy is reinforced by research assessment frameworks that reward output in high-impact, English-language journals indexed in databases such as Web of Science and Scopus (Duszak & Lewkowicz, 2008; Mironescu et al., 2023). Such arrangements disadvantage national-language and minority-language scholarship, limiting its circulation, citation, and policy uptake. Countering these imbalances requires systemic measures: dedicated funding streams for high-quality publications in national and regional languages; the establishment and international promotion of rigorously peer-reviewed regional journals; and the expansion of indexing systems to better reflect scholarly production beyond the Anglophone core. These interventions would diversify the academic canon while ensuring that research remains legible and relevant to local communities, policymakers, and practitioners. Third, epistemic plurality demands recovering and reintegrating the region's marginalized intellectual traditions. The Flying University in Poland, operating clandestinely under partitions and during socialist censorship, and the interwar sociological school of Dimitrie Gusti in Romania, which developed innovative locally-informed research methodologies, represent forms of scholarship that persisted outside dominant institutional frameworks (Golopenția, 2014; Pszenicki, 1979). Post-socialist reforms, however, often privileged imported governance templates over the revitalization of these traditions (Steiner-Khamsi, 2002). Revisiting such intellectual legacies can serve as a resource for decolonizing CEE higher education by grounding institutional design in regionally adapted epistemic traditions rather than purely external models.

Finally, advancing epistemic justice requires centering the voices of those most affected by exclusionary governance: early-career scholars, faculty in under-resourced

regional universities, and academics from linguistic and ethnic minorities. These groups face overlapping challenges such as precarious contracts, limited research funding, restricted access to publication networks, yet their perspectives are vital for envisioning more inclusive academic practices (Becker, 2024). Mechanisms such as participatory university senates, inclusive grant review boards, and institutionalized support for collaborative, community-driven research can help redistribute epistemic authority. As Mignolo (2011) notes, such participation is not an optional 'add-on' but a condition for dismantling the 'coloniality of knowledge' that continues to shape global and regional academic hierarchies.

While regionally embedded forms of scholarship are crucial for epistemic plurality, they also raise concerns about possible parochialization. The challenge is not to retreat into localism but to imagine academic ecosystems that are situated yet outward-looking. Comparative examples from outside CEE help clarify what such alternatives might entail. Ivancheva's (2023) work on the Bolivarian University of Venezuela shows how one of the most ambitious contemporary attempts to build an 'alternative university' sought to counter the global decline of the public sector and respond to intensified precarization, privatization, and marketization. Her analysis demonstrates both the possibilities and the contradictions of designing a university around principles of social inclusion, mass participation, and public responsibility rather than competition and market logics. Intercultural universities in Latin America, as discussed by Guilherme and Dietz (2017), offer a different but related model: they institutionalize epistemic plurality by bringing Indigenous and Afro-descendant knowledge systems, community-based pedagogies, and polyphonic understandings of 'interculturalidad' into higher education. These experiments indicate that alternatives to the Anglophone, scientometric university are not simply nostalgic returns to the local. They are relational, socially grounded practices that engage broader publics and epistemic traditions and offer insights with clear relevance for CEE.

A number of contemporary initiatives across the region already conceptualize what such epistemic plurality might look like in practice. Multilingual and regionally oriented journals that continue to publish in national languages alongside English, such as *Academia* (https://journals.pan.pl/academiaPAS/152934?language=en) in Poland and *Revista de Pedagogie* (https://revped.ise.ro/), *Revista Transilvania* (https://revistatransilvania.ro) or the *Journal of Performing Arts* (https://reviste.ulbsibiu.ro/jas/) in Romania, as well as series published by university presses in both countries, demonstrate the ongoing vitality of research that is locally anchored yet globally relevant. Open repositories such as the Central and Eastern European Online Library (CEEOL), along with newer institutional archives, help bring into view scholarship that falls outside the narrow boundaries set by Web of Science or Scopus.

Community-engaged research labs, urban democracy groups, feminist collectives, and civic-oriented publishing projects, including those linked to *Krytyka Polityczna*

(*Political Critique*), offer a different way of thinking about how knowledge circulates in the region. These initiatives work across languages, publics, and institutional boundaries, and they unsettle the idea that scholarship gains value only when it passes through Anglophone, citation-driven channels. Noticing and citing these experiments is a form of citational justice: they demonstrate that alternative modes of producing and sharing knowledge in CEE already exist, even if they remain unevenly supported or institutionally peripheral.

The pursuit of epistemic plurality will be neither linear nor uncontested. It involves challenging entrenched power structures, reconfiguring the political economy of academic publishing (Larivière et al., 2015), and redefining what constitutes scholarly excellence. Yet without such efforts, the CEE university risks remaining a site of epistemic reproduction rather than transformation. The stakes extend beyond the academy: they touch on the capacity of these institutions to serve as democratic spaces where diverse knowledges can coexist, inform public life, and imagine alternative futures. These emerging initiatives do not yet resolve the challenges identified earlier, but they reveal spaces of possibility. The conclusion returns to the broader implications of treating governance as an epistemic regime.

Conclusion

This article has argued that the reform of higher education governance in post-socialist Central and Eastern Europe, while frequently framed in terms of modernization, autonomy, and internationalization, has also operated as a process of epistemic selection. In both Poland and Romania, governance structures have not only shaped institutional hierarchies and administrative procedures but have played a decisive role in legitimizing some forms of knowledge while marginalizing others.

Drawing on historical and contemporary case material, we have shown that the suppression of epistemic plurality under socialist regimes, through ideological control, curricular restructuring, and institutional purges, created enduring legacies that have not been fully dismantled to this day. Instead, these have been reproduced in new forms, often under the guise of technocratic reform and global benchmarking. The emphasis on international publication metrics, managerial efficiency, and English-language dominance has further entrenched hierarchies of knowledge that privilege the already dominant and silence the local, interdisciplinary, and critical.

The concept of disregarded epistemologies offers a productive lens through which to understand the layered exclusions that persist in CEE academia. These are not only relics of the past but ongoing effects of governance frameworks that remain epistemically narrow. Addressing them requires more than minor adjustments to institutional metrics or symbolic gestures toward diversity. It requires a fundamental reimagining of what universities are for, whom they serve, and whose knowledge they honor.

To move toward epistemic justice, CEE higher education must embrace evaluative frameworks that recognize the value of knowledge rooted in linguistic diversity,

community engagement, and historical continuity. It must support structures that allow marginalized scholars to contribute not as exceptions but as central participants in shaping the academic field. Most importantly, it must confront the legacies of epistemic exclusion not as anomalies but as systemic patterns that demand structural transformation.

The politics of knowledge are inseparable from the politics of governance. As the region continues to navigate its position between historical legacies and global aspirations, the future of its universities will depend on their capacity to reckon with the exclusions of the past and the epistemic possibilities of a more plural, just, and inclusive academic future.

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Epistemological gaps in medical education: a bibliometric and critical analysis of contemporary academic discourse

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Abstract

Contemporary medical education is shaped by imperatives of efficiency, measurability and standardisation, often to the detriment of epistemological reflection. This study investigates how epistemological themes—critical reflection, uncertainty, epistemic justice, reflective reasoning—are represented in recent academic discourse. A bibliometric analysis was carried out on a corpus of 2,830 PubMed-indexed articles (2015–2025), followed by a qualitative interpretation of keyword co-occurrence networks generated in VOSviewer at three thresholds (≥5, ≥20, ≥40 occurrences). The analysis revealed a discursive structure dominated by themes such as "curriculum", "clinical competence", "simulation", "assessment" and "students". In contrast, terms such as "epistemic uncertainty", "critical thinking", "reflective practice", "epistemic injustice", or "bias" were absent from the central networks or completely non-existent at high thresholds. Semantic clustering indicated a systemic orientation towards a performative, technological and algorithmic vision of medical training, to the detriment of the critical, narrative and humanistic dimensions of medical knowledge. Findings indicate the existence of systemic epistemological gaps, with implications for clinical reasoning, professional uncertainty management and the integration of patient experience as epistemic knowledge. The study suggests the need for a curricular reconfiguration that integrates epistemic reflection into medical training.

Keywords: medical education, epistemology, clinical reasoning, uncertainty, cognitive bias, critical reflection, epistemic injustice, VOSviewer, bibliometric analysis, medical curriculum, clinical competence, narrative medicine.

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Introduction

Medical education between science, epistemology and humanism

Modern medical education is more than just the accumulation of scientific knowledge or technical training: it is a complex, ongoing process that combines science, clinical practice and the profoundly human dimension of healthcare. Essentially, training a doctor involves not only imparting information, but also cultivating a critical, reflective and ethical understanding of the medical act, which lies at the intersection of science and humanity (Bleakley et al., 2011). In this formative equation, epistemology (the branch of philosophy that deals with the nature, sources and limits of knowledge) plays an essential, though often neglected, role. In the medical context, epistemology becomes a necessary framework for understanding how clinical knowledge is constructed, validated and applied. However, current medical education seems to be affected by significant epistemological gaps that compromise the comprehensive training of medical professionals. The problem is not only theoretical, but has direct implications for practice, the doctor-patient relationship and public health in general (Montgomery, 2006; Greenhalgh et al., 2014).

Research aim and contribution

The aim of this study is to examine how epistemological concepts are represented in contemporary academic discourse on medical education and to identify the structural gaps that shape current approaches to clinical training. By combining bibliometric mapping with qualitative interpretation, the paper contributes to the field by offering a systematic, evidence-based overview of epistemological absences in medical education literature and by outlining their implications for curriculum design, clinical reasoning and reflective professional formation.

Epistemological gaps in medical training: typologies and effects

One of the most significant limitations is biological reductionism, i.e. the tendency to interpret health and disease almost exclusively through a biological lens. This model, specific to modern biomedical-inspired medicine, often ignores the psychological, social, cultural or spiritual dimensions of illness, factors that are essential for a complete understanding of the patient's experience (Engel, 1977; Borell-Carrió et al., 2004). The result is a therapeutic relationship devoid of depth and an approach that treats the disease, but not necessarily the sick person. This perspective is exacerbated by the fragmentation of medical knowledge, induced by overspecialisation and excessive compartmentalisation of the university curriculum. Instead of an integrated view of the body and health, students end up with highly specialised knowledge, but with major difficulties in applying it in a holistic clinical context (Flexner, 1910; Frenk et al., 2010). Medicine thus becomes a sum of parts, lacking a unifying epistemological architecture. Another major problem is the neglect of epistemological reflection in the educational process. Future doctors are rarely encouraged to question the nature or validity of the

knowledge they receive. Courses such as philosophy of science, medical epistemology or applied ethics are often optional, if not completely absent. This lack of critical training leads to a dogmatic acceptance of information, which weakens intellectual autonomy and the ability to adapt to unforeseen clinical situations (Upshur et al., 2001; Michel, 2007). Last but not least, the epistemological limitation of evidence-based medicine (EBM) is also worth discussing. Although EBM has brought significant benefits in standardising and streamlining medical practice, in some cases it becomes a form of epistemic rigidity. A strictly applied hierarchy of evidence risks excluding clinical judgement, professional experience and patient values, which are essential elements in a truly individualised medical practice (Greenhalgh et al., 2014; Tonelli, 2006).

Epistemological and clinical consequences of these limitations

The consequences of these epistemological shortcomings are numerous and serious. They can lead to the training of professionals who lack intellectual autonomy, are incapable of critical reflection, and have a poor understanding of the existential dimension of illness. Furthermore, the lack of systemic thinking and training in managing uncertainty favours burnout, a rigid relationship with the patient and the dehumanisation of the medical act (Charon, 2006; Wear & Zarconi, 2008).

Possible directions for epistemological reform in medical education

To counteract these trends, a systematic integration of the humanities into the medical curriculum is necessary: courses in philosophy, ethics, medical anthropology, medical sociology or the history of medicine can play a key role in the formation of critical, empathetic and contextualised thinking (Bleakley, 2015; Hafferty & Franks, 1994). It is also essential to reconceptualise the student as an active epistemic subject. This involves encouraging personal reflection, promoting metacognitive thinking and stimulating critical analysis of the specialist literature. Instead of passive learning, there is a need for a pedagogy of questioning, debate and continuous reflection (Branch, 2010; Kumagai & Lypson, 2009). A transdisciplinary and systemic approach is required, one that transcends strictly biomedical boundaries. The interconnection between medicine and fields such as ecology, economics, and psychology can lead to a deeper understanding of health as a complex, emergent, and dynamic phenomenon (Nicolescu, 2002; Morin, 2008).

Medical education in the 21st century can no longer be reduced to mere technical and scientific training. It must train reflective professionals who are capable of navigating the complexity and uncertainty of clinical reality. Epistemological reforms do not imply abandoning scientific rigour, but rather complementing it with critical thinking, ethical awareness and sensitivity to the profoundly human dimension of illness. Without this transformation, medicine risks becoming an applied technology, emptied of its fundamental human and social meaning.

Between knowledge and uncertainty – an epistemological problem in medical education

Contemporary medical education is undergoing a continuous process of transformation, trying to keep pace with the accelerated pace of scientific progress, social changes and the increasing complexity of clinical practice. However, despite the refinement of the curriculum and the emphasis on evidence-based medicine (EBM), a set of profound epistemological gaps persist that affect how future doctors understand, construct and apply medical knowledge. These gaps are not merely pedagogical or curricular, but involve a series of fundamental questions: What does it mean to "know" in medicine? What sources of knowledge are valid? How is uncertainty managed? – questions that pertain to the epistemology of medical practice.

A first level of the problem is represented by the fragmentary nature of initial training, in which students acquire compartmentalised information (anatomy, physiology, pharmacology), but are rarely guided in integrating it into coherent clinical reasoning (Deschênes et al., 2025). This model of "chunked learning" produces superficial knowledge that is poorly anchored in context, making it difficult to transition from theory to clinical practice (Cate & Durning, 2017). In addition, the traditional emphasis on memorisation and factual reproduction limits the development of critical thinking and epistemic reflection, two essential skills in the formation of intellectual autonomy (Eastwood et al., 2017).

Medical education continues to reproduce an authoritarian model of knowledge transmission, in which teachers or senior doctors are considered infallible sources. This dependence on authority is a form of epistemic gap, as it reduces the student's ability to question sources of knowledge and construct independent medical judgement (Ackers et al., 2020). In this context, there is a notable absence of educational components that introduce concepts such as epistemic uncertainty, cognitive biases, decision-making in conditions of ambiguity, or the epistemology of evidence, which are essential topics in real medical practice but rarely explicit in the curriculum (Sadler, 2023).

Another source of epistemological tension is the disjunction between the ideal of evidence-based medicine and the concrete realities of clinical practice. Although EBM provides a rigorous framework for evaluating and applying scientific evidence, students often find that medical decisions are guided by routine, local traditions or institutional pressures, a reality that generates a conflict between "science" and "experience" (Greenhalgh et al., 2014). This disconnect highlights the lack of adequate training in navigating uncertainty and critically evaluating sources of knowledge in a clinical context (Gheihman et al., 2020).

Medical training often ignores the narrative, emotional, and contextual dimensions of suffering, reducing the patient to a sum of symptoms and biomarkers. Such a view excludes knowledge through personal experience and the patient's voice as legitimate epistemic sources, which can lead to epistemic inequity, a form of marginalisation of patients who do not fit standard patterns (Fricker, 2007; Kidd & Carel, 2017). This lack

of epistemic diversity is exacerbated by university curricula, which do not take into account cultural, socioeconomic, or ethnic variations in the expression and perception of disease (Tsai et al., 2016).

The structural gaps in the medical education system, such as the lack of active and reflective teaching methods (simulations, case-based learning, guided reflection), or inequalities in access to scientific language and resources, should also be mentioned. All of these contribute to the perpetuation of a system in which medical knowledge is transmitted but not questioned, in which one learns "what to think" but not "how to think" (Bleakley, 2015).

In this context, an epistemological approach to medical education is no longer optional, but essential for training reflective, critical and adaptable professionals. Only by recognising and addressing these epistemological gaps can we build a medical education that reflects the real complexity of medicine, but also the ethical responsibility of knowledge in the service of humanity.

Regional grounding

Although the bibliometric analysis is international in scope, the critical reflection underpinning the study is informed by the European, and in particular Central and Eastern European, context of medical training. This region remains marked by a historically biomedical educational paradigm, with slower institutional integration of medical humanities, reflective practice or epistemology. Understanding these regional dynamics helps situate the analysis and highlights the relevance of epistemological reform in societies where medical education has traditionally emphasised technical competence over reflective professional development.

Methodology

Research design: This study adopts an exploratory bibliometric methodology (Donthu et al., 2021), combined with a qualitative-interpretative analysis of keyword co-occurrence networks, in order to identify epistemological gaps in the academic literature on medical education. The method allows for the investigation not only of thematic frequency, but also of the conceptual structure of the scientific field.

Methodological objective: To map the contemporary academic discourse on medical education (with an emphasis on epistemology) (Eastwood et al., 2017), looking at which themes are dominant, which epistemological concepts are present or absent, and how the conceptual structure varies according to co-occurrence frequency.

Article search and selection strategy: The database used was PubMed (https://pubmed.ncbi.nlm.nih.gov), chosen for its relevance to biomedical medical and educational literature. Advanced query involved the following formula: ("epistemology" OR "epistemic cognition" OR "knowledge gaps" OR "clinical reasoning" OR "critical thinking" OR "reflective practice" OR "epistemic uncertainty" OR "epistemic injustice") AND ("medical education" OR "medical students" OR "medical curriculum" OR "clinical training"). The filters applied were: publication date (last 10 years - 2015–2025), article

type (review and research article), subject - studies on humans (Humans[MeSH]) and language (English).

Selection result: total number of articles included - 2,830 and export format, PubMed (.txt) for further processing in VOSviewer. The analysis tool was the VOSviewer programme, and the software used was VOSviewer v.1.6.20, developed by Van Eck & Waltman (Leiden University, Centre for Science and Technology Studies – CWTS) (van Eck & Waltman, 2010). In terms of the type of analysis, the co-occurrence of author keywords was analysed within a co-occurrence network. The parameters analysed in the research were the occurrence thresholds (5, 20, 40), the grouping algorithm was the VOS clustering technique, the network visualisation involved density view and cluster view, and finally, maps were created in image format (.jpg).

Data analysis: The quantitative (bibliometric) stage involved identifying thematic networks by frequency and intensity of links between terms and identifying central nodes (e.g., "medical students", "clinical competence") and marginal nodes (e.g., "epistemic injustice", "uncertainty"). The qualitative-interpretative stage involved classifying and interpreting clusters according to dominant themes, significant absences, and implicit or explicit epistemological links. Comparison between networks obtained at different thresholds was used to assess the conceptual robustness of epistemological themes.

Methodological challenges

Conducting a bibliometric study in a field where epistemological terminology is inconsistently used presents inherent difficulties. Many epistemic concepts relevant to clinical reasoning—such as uncertainty, judgement or reflective cognition—may be embedded in articles but omitted from author-selected keywords, leading to underrepresentation in co-occurrence networks. Additionally, VOSviewer's clustering algorithm tends to privilege high-frequency technical terms, which may obscure less conventional or humanistic concepts. These challenges required a qualitative interpretive stage to ensure that absences were analysed critically rather than taken at face value.

Methodological limitations: PubMed does not systematically index epistemological terms (e.g., "epistemic injustice"), which may lead to underrepresentation. The absence of certain terms does not mean that epistemological reflection does not exist, but rather that it may not be labelled as such. Keywords are chosen by authors, so they may reflect thematic preferences rather than the deep structure of the articles.

Ethics and transparency: No sensitive data or human subjects were used. Sources are public, accessible, and cited according to scientific standards. All procedures comply with the norms of responsible research and academic integrity.

Author positionality

The perspective adopted in this paper is shaped by the author's professional trajectory within Romanian medical education and healthcare. As a senior physician in

Anaesthesia and Intensive Care, with eight years of experience as Head of Department and Medical Director in a general private hospital, the author has been directly exposed to the clinical, organisational and epistemological challenges of contemporary medical practice. In parallel, seven years of teaching in higher education—predominantly in medical sociology and interdisciplinary courses involving medical, social work, pharmacy and nursing students—have provided insight into how different professional communities construct, interpret and apply medical knowledge. This dual experience informs the critical interpretation of epistemological gaps and the call for more reflective, humanistic and context-aware medical education.

Additional study limitations

The present analysis examines published research, not curricula or teaching practices themselves. Therefore, the findings reflect how medical education is represented in academic discourse rather than how it is concretely designed or implemented in specific national contexts. Moreover, using English-language publications introduces heterogeneity: studies may refer to educational systems with fundamentally different structures (e.g. postgraduate training in the US vs. undergraduate entry programmes in Europe). These constraints limit the extent to which conclusions can be generalised about actual curricular content and highlight the need for future qualitative and comparative research on medical curricula across countries.

Results

Semantic cluster analysis

The general semantic distribution was observed through the analysis of keyword co-occurrence, which generated three distinct thematic networks, depending on the frequency threshold used. This distribution can be seen in Table 1.

Table 1

General semantic distribution

Co-occurrence threshold	No. of terms included	Observations
≥5	779	Wide coverage, marginal themes visible
≥20	199	Well-defined dominant themes
≥40	91	Only the core of institutionalised discourse

The structure of the identified networks and clusters is fairly homogeneous; at all thresholds, the VOSviewer algorithm generated 4–5 major semantic clusters, as can be seen in Table 2.

Table 2

Structure of identified networks and clusters

Thematic cluster	Central terms	Dominance
Formal medical education	"students", "medical", "curriculum", "teaching", "feedback"	Very high
Clinical competence	"clinical competence", "simulation", "assessment"	High
Public health/behaviour	"health knowledge", "attitudes", "practice patterns"	Medium
Digital education/simulations	"virtual reality", "anatomy", "technology-enhanced learning"	Media
Social/contextual dimensions	"gender minorities", "interprofessional education"	Low

Semantic analysis showed that epistemological themes are poorly represented or completely absent from the discourse. Table 3 summarises some key findings.

Table 3

Presence and absence of epistemological terms

Epistemological concept	Presence in networks	Observations
"epistemology"	Marginal (threshold 5)	Absent at thresholds 20/40
"epistemic uncertainty"	Non-existent	Does not appear at threshold 5
"reflective practice"	Marginal (threshold 5)	Weak links, peripheral term
"epistemic injustice"	Non-existent	Totally absent in all networks
"critical thinking"	Appears rarely, in isolation	Not connected to central terms
"bias", "heuristics"	Non-existent	Although fundamental to clinical reasoning

The evolution of discourse according to the co-occurrence threshold was assessed by comparing networks at different thresholds and revealed a clear process of epistemic filtering. At threshold 5, we are allowed access to alternative, social, narrative concepts, but these remain semantically isolated. Moving to threshold 20, institutionalised themes (curriculum, competence, simulation) are emphasised, while epistemology disappears completely. At threshold 40, a hyper-standardised, technological and efficiency-based core is formed, with an educational discourse devoid of critical reflection.

Comparative analysis of VOSviewer maps

Map 1 (minimum co-occurrence threshold 5): Conceptual macro-landscape

General characteristics: this is the densest map (779 terms) and there is a huge semantic core around "humans", "medical students" and "internship and residency". The map (shown in Figure 1) is divided into 5-6 clusters, relatively well defined thematically.

Red cluster: Clinical practice and pathologies (e.g. "treatment outcome", "heart failure", "diabetes mellitus");

Green cluster: Medical education and professional training (e.g. "students", "feedback", "teaching");

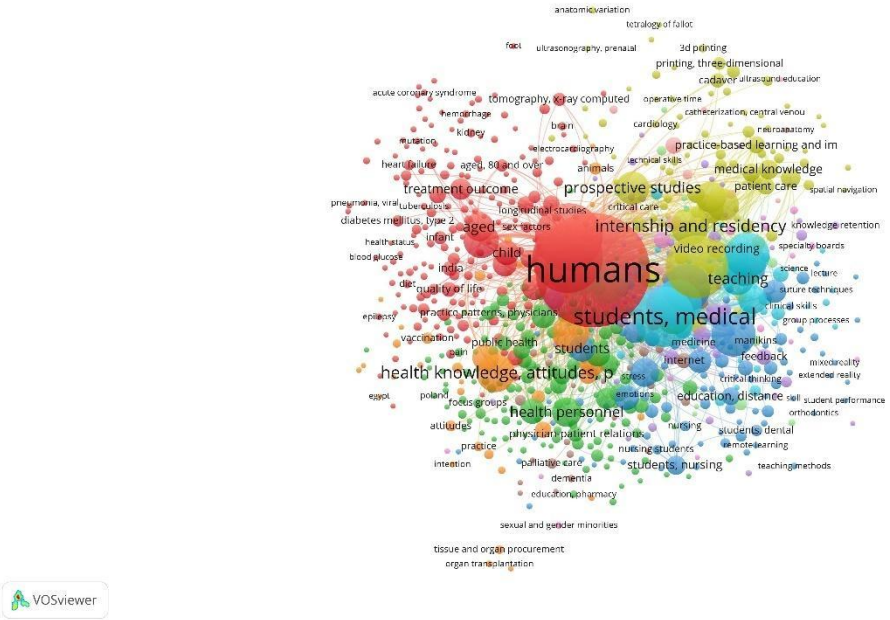
Blue cluster: Clinical techniques and skills (e.g. "clinical skills", "simulation", "virtual reality");

Yellow cluster: Technical/imaging aspects (e.g. "anatomy", "cadaver", "3D printing");

Orange cluster: Social and minority issues (e.g. "sexual and gender minorities", "palliative care").

Figure 1

Bibliometric image at a term co-occurrence threshold of 5



The epistemological interpretation focuses on the fact that biomedical topics ("disease", "treatment", "organs") dominate, reflecting an approach that is still biologically centred. Terms such as "critical thinking", "uncertainty", "epistemology" or "reflective practice" are absent or very peripheral, suggesting an underrepresentation of epistemic reflection in the corpus of articles.

Map 2 (threshold 20): Clearer thematization, more visible networks

General characteristics: 199 terms are included; background noise is reduced and the main relationships are highlighted. Four large clusters emerge (as can be seen in Figure 2).

Yellow cluster: Medical education and curriculum ("active education", "feedback", "teaching");

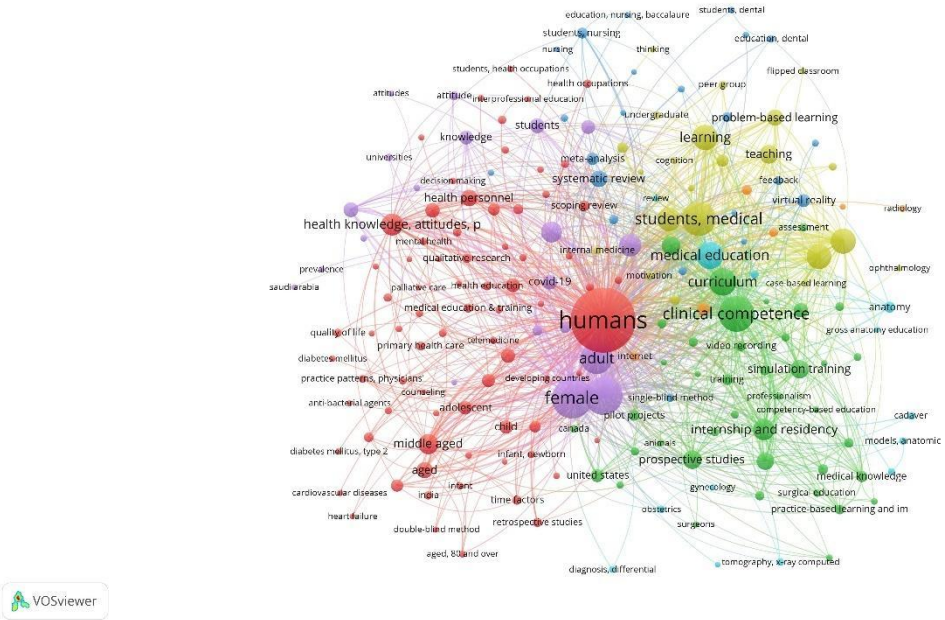
Green cluster: Applied clinical training ("internship", "residency", "competence");

Red cluster: Public health and attitudes ("health knowledge", "practice patterns", "mental health");

Blue cluster: Digital education and simulations ("virtual reality", "anatomy", "suture techniques").

Figure 2

Bibliometric image at a term co-occurrence threshold of 20



The main epistemological observations stem from the fact that terms such as "problem-based learning", "case-based learning", "feedback" and "simulation" are central and indicate an orientation towards applied methods, but not necessarily reflexive ones. Terms such as "bias", "epistemology", "epistemic uncertainty", "judgment", and "decision-making under uncertainty" are missing, suggesting that epistemological themes are systematically neglected in the central discourse.

Map 3 (threshold 40): The dominant core of the discourse

General characteristics: major terms are included and provide a very clear overview of the dominant themes. The clusters are more merged, but still persist (as can be seen in Figure 3).

Yellow cluster: includes terms such as “clinical competence”, “curriculum”, “education”;

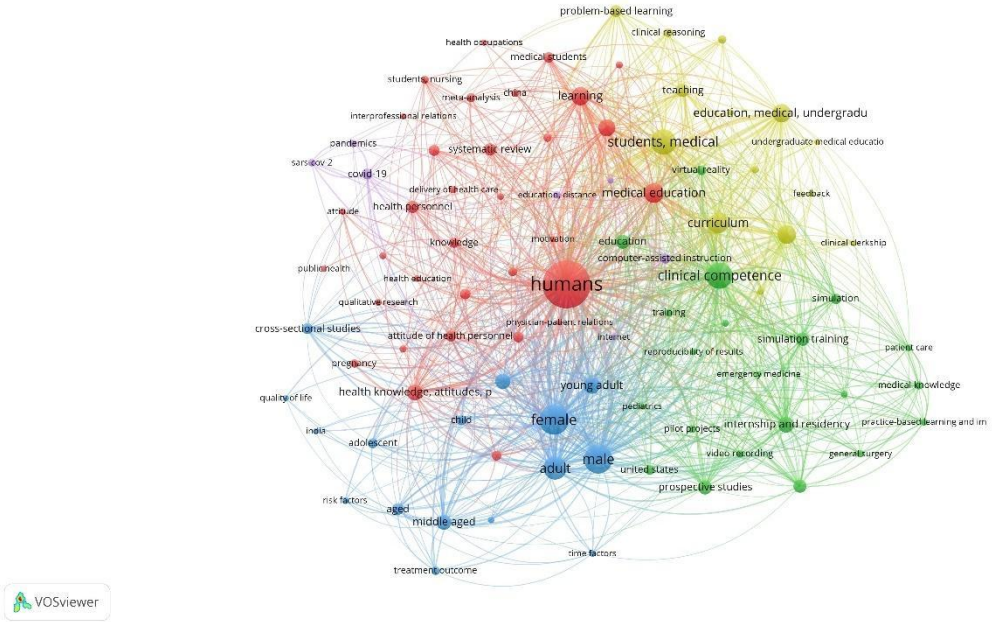
Red cluster: includes terms such as “health knowledge”, “attitude”, “health personnel”;

Blue cluster: Demographics and social context; includes terms such as “female”, “young adult”, “adolescent”;

Green cluster: Clinical practice; includes terms such as “internship and residency”, “simulation training”, “practice-based learning”.

Figure 3

Bibliometric image at a term co-occurrence threshold of 40



The epistemological observations are based on the fact that the map reflects medical education focused on results and clinical performance, not on the construction of knowledge.

Critical terms are missing (e.g., “epistemic injustice”, “reflective practice”, “uncertainty”), confirming that epistemological gaps are not visibly addressed in the dominant literature. The red cluster suggests a connection between medical education and public health, but from a perspective that is more oriented towards behaviours and attitudes, not towards how knowledge is constructed, contested or transmitted.

The analysis of bibliometric maps shows us that epistemology is peripheral; key terms in the field of medical epistemology (e.g. “epistemic uncertainty”, “epistemic injustice”, “critical thinking” or “cognitive bias”) do not appear as central nodes either at low thresholds or in dominant networks, suggesting a structured epistemological gap in the literature on medical education. The curriculum is focused on “competence” rather than “epistemic reflection”. “Clinical competence”, “simulation”, “assessment” and

"curriculum" are very central, but they are not accompanied by terms that imply an analysis of how competence is constructed. Academic medical discourse is largely technological and standardised; modern methods (e.g. "VR", "simulation", "teaching methods") are strongly represented, but they support an applied pedagogy, not a reflective one.

Epistemological gaps identified based on network analysis and qualitative interpretations have been compiled in Table 4. The results suggest a dominance of the performative-instrumental paradigm in medical education. Epistemology, as a concern for the nature, validity, and limits of knowledge, remains peripheral, poorly connected, or completely absent in mainstream scientific discourse. This finding provides a solid foundation for the development of future curricular interventions and critical research.

Table 4

Identified epistemological gaps

Type of gap	Description
Epistemic	Lack of reflection on how knowledge is constructed and justified
Uncertainty	Underrepresentation of ambiguous and probabilistic decision-making contexts
Cognitive	Absence of biases and errors of judgement as objects of pedagogical study
Epistemic equity	Lack of concern for marginalised voices or diversity of patient experience
Narrative	Exclusion of narrative medicine and lived knowledge

Analysing each semantic cluster (group of terms) in the map is useful for understanding which themes dominate academic discourse in medical education and how they relate (or do not relate) to epistemological dimensions.

Red cluster: Illness and health behaviour

The central terms are "health knowledge", "attitudes", "practice", "health personnel", "quality of life", "diabetes mellitus", "practice patterns", "mental health" and "public health". This cluster is anchored in research on health behaviour, attitudes towards disease and chronic disease management. There is a link to medical education through the prism of health education, but no transition to epistemic reflection is made. The epistemological gaps can be summarised as follows: knowledge is treated as transferable information, not as a critical process of contextualised learning; there is no questioning of sources or the validity of information. This aspect is found in the literature that criticises the 'linear transfer' model of knowledge in public health (Greenhalgh & Sietsewieringa, 2011).

Green cluster: Clinical skills and professional training

The central terms are "clinical competence", "internship and residency", "simulation", "medical knowledge", "video recording", "assessment" and "patient care". This represents the most "technical" area of medical education. The emphasis is on skills training, assessment and clinical simulation, with a highly standardised framework.

Epistemological gaps are found in the lack of reflection on how skills are defined and measured; the validity of clinical assessment and decision-making uncertainty are absent as terms. The literature has identified these gaps in various areas of medical practice. In mental health, there is talk of assessment in the post-psychometric era, which will involve learning subjective and collective love (Hodges, 2013). What should every teacher know about clinical reasoning? This is already a question (Eva, 2005) that awaits answers and practical applications.

Yellow cluster: Teaching methods and curriculum

Key terms are "students", "medical", "curriculum", "feedback", "problem-based learning", "case-based learning", "teaching", "assessment" and "motivation". The cluster focuses on modern teaching methods and curriculum design. Despite the innovative vocabulary, knowledge is treated as content to be delivered efficiently. Epistemological gaps consist in promoting processes of "engagement" and "feedback" without a framework that cultivates critical, reflective clinical reasoning. Terms such as "epistemic cognition", "epistemic humility" or "uncertainty" do not appear. The literature has begun to examine the relationship between the contexts of medical learning and practice and epistemic cognition, because this relationship has the potential to improve medical education (Eastwood et al., 2017). The call for reform of medical education returns from time to time in the academic medical landscape (Mooly Cooke, 2010), as evidence of a rigidity in changing core principles; assessment must go beyond what students know and can do to address their ability to identify gaps and next steps for learning (Molly. Cooke, Irby, & O'Brien, 2011).

Blue cluster: Demographics and context

The central terms are "female", "male", "adult", "young adult", "pregnancy", "cross-sectional studies", and "developing countries". This is a statistical cluster, centred on the populations studied. It reflects a concern for inclusion and representativeness in studies, but is not related to the student's epistemological training. The epistemological gaps could be summarised in the fact that epistemic inequity (Fricker, 2007) is not addressed, nor is the lack of patient representation in professional training.

Purple cluster: Public health and interprofessional education

The central terms are "students", "nursing", "students", "health occupations", "interprofessional education", "telemedicine", "health education" and "systematic review". The emphasis is on collaborative, interprofessional education, but in terms of "efficiency" and "deliverability". Epistemic reflection on collaboration is almost absent. Although training programmes for health professionals have succeeded in providing graduates with the necessary skills, knowledge and standards of professionalism, the predominant emphasis on specialisation and training oriented exclusively towards one's own profession has contributed to the consolidation of a single-professional identity. This orientation has proven to be a significant obstacle to the development of a collaborative interprofessional practice that is truly person-centred (Khalili et al., 2013).

This cluster analysis leads to the observation that the dominant discourse in medical education is oriented towards efficiency, performance and technology, but does not systematically include reflection on how knowledge is constructed, limited or distorted. Key epistemological terms such as "epistemic uncertainty", "epistemic humility", "reflective reasoning" or "cognitive bias" are missing from the core. This absence confirms the existence of an epistemological gap in the dominant discourse, a topic with high potential for critical research and educational reform.

Discussions

Reconfirmation of a dominant performative-instrumental paradigm

The results of the bibliometric analysis unequivocally indicate that the dominant scientific literature in medical education is centred on a performative, technological and standardised paradigm, in which concepts such as "curriculum", "clinical competence", "simulation" and "assessment" occupy central positions in semantic networks. In contrast, epistemological reflection on how medical knowledge is constructed and validated is either marginalised or completely absent. This orientation reflects a way of conceiving medical education as a process of efficient information delivery and development of measurable skills, but not as a space for training critical thinking, intellectual autonomy and the ability to navigate clinical uncertainty (Mooly Cooke, 2010; Bleakley, 2015).

Systemic epistemological gaps – a deeply structured problem

The absence of terms such as "epistemic uncertainty", "reflective practice", "epistemic injustice" or "cognitive bias" from the centre of the analysed networks indicates not a simple accidental omission, but a systemic epistemological gap. Medical training does not systematically encourage reflection on the nature of medical knowledge, the limits of evidence and the uncertainty that accompanies medical practice (Eastwood et al., 2017). Paradoxically, although medicine is a practice deeply dependent on context, ambiguity and uncertainty, medical training remains beholden to a positivist episteme, in which truth is perceived as objective, stable and transmissible, rather than constructed, contextual and negotiable.

Consequences for the professional training of future doctors

This orientation can have a number of significant effects on the quality of medical training. The inability to manage clinical uncertainty can lead to professional anxiety and risk of burnout (Gheihman et al., 2020); at the same time, it can lead to a deficit in critical thinking and rational autonomy, with a tendency to follow algorithms without understanding clinical nuances. Lack of awareness of cognitive biases can increase the risk of medical error; excluding the patient as an epistemic subject affects the quality of the therapeutic relationship and equity in care.

Exclusion of narrative knowledge and humanistic medicine

The absence of concepts such as "narrative medicine" or "subjective experience" reflects a reductionist approach to disease in biology. The lived dimension of suffering, which involves valid but non-quantitative knowledge, is rarely addressed; without a narrative dimension, medicine risks becoming an applied technology rather than a humanistic profession (Charon, 2006).

Implications for curriculum reform

To correct these epistemological imbalances, interventions are needed at the curricular, institutional and epistemic levels: the introduction of epistemic reflection in medical training (seminars dedicated to medical epistemology, uncertainty and decision-making in conditions of ambiguity, the integration of critical, metacognitive thinking and "epistemic humility" in all stages of training), education focused on uncertainty and biases (training in recognising and managing cognitive biases, studying clinical errors as an epistemological source, not just as technical failures), the recovery of narrative medicine and patient experience (integration of patient stories into clinical training, capitalising on experiential knowledge in everyday practice) and promoting epistemic equity (revising the curriculum to reflect cultural, racial and gender diversity and critically learning how certain perspectives, such as those of marginalised patients, may be excluded from medical practice).

Clarifying the scope of the analysis

The study does not evaluate medical curricula or teaching practices directly, but analyses how they are conceptualised within the international academic literature. Consequently, the findings concern the epistemological orientation of scholarly discourse rather than the concrete design of educational programmes. Because the analysed publications originate from diverse educational systems, their curricular assumptions vary widely—from postgraduate medical training in North America to early-entry undergraduate models typical of Europe. This reinforces the argument that systematic, comparative, qualitative research on medical curricula is needed to understand how epistemological dimensions are actually enacted in practice.

Conclusions – A critical look at epistemic absences in medical education

This study set out to examine how epistemological concepts are represented in contemporary academic discourse on medical education. Through a large-scale bibliometric analysis of 2,830 PubMed-indexed articles and a qualitative interpretation of keyword co-occurrence networks, the findings reveal a significant imbalance in the structure of the field. The dominant discourse is centred on curriculum design, competence training, simulation, assessment and other performative-instrumental elements, while epistemological themes—epistemic uncertainty, reflective practice, cognitive bias, epistemic injustice, narrative knowledge—remain marginal or absent from the conceptual core.

These patterns indicate a systemic epistemological gap that extends beyond terminology: they reflect a mode of understanding medical education primarily as the delivery of measurable skills rather than the cultivation of reflective, context-aware, and critically engaged professionals. The low visibility of concepts related to uncertainty, judgement, and epistemic humility is particularly paradoxical given the centrality of such dimensions to real clinical practice. As a result, current educational discourse risks reinforcing an overly technical paradigm that obscures the humanistic, interpretive and relational dimensions of medicine.

The implications are substantive. A medical curriculum that does not explicitly train students to navigate uncertainty, recognise biases, integrate patient narratives, or question the limits and sources of medical knowledge may produce competent technicians but insufficiently reflective clinicians. This is especially relevant in educational systems—such as those in Central and Eastern Europe—where the historical prevalence of a strictly biomedical model has delayed the integration of medical humanities and epistemic reflection. In such contexts, addressing epistemological gaps becomes not only an academic imperative but a practical necessity.

At the same time, the study acknowledges its own methodological boundaries. Analysing published academic discourse is not equivalent to evaluating national curricula or concrete teaching practices, and English-language publications reflect a diversity of educational structures. These limitations reinforce the need for future comparative qualitative research on curricula and student experiences across different countries.

Overall, the paper contributes to the field by offering the first systematic bibliometric mapping of epistemological concepts in medical education and by demonstrating how their structured absence shapes contemporary understandings of clinical training. Strengthening medical education in the 21st century requires complementing scientific rigour with epistemic reflection, integrating uncertainty as a core learning domain, and re-humanising medical knowledge. Only through such a reconfiguration can medical education prepare professionals capable not only of applying evidence, but of understanding its limits, interpreting complexity, and engaging responsibly with the lived experience of patients.

In a medical future dominated by artificial intelligence, big data, and decision algorithms, it is precisely these epistemological qualities—humanistic, reflective, and critical—that will make the difference between a mere executor and a true professional of knowledge. And medical education has a duty to cultivate this difference.

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Teacher Mentoring: Histories, Translations, and Reforms in Romania and the Republic of Moldova

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Abstract

This paper re-examines the historiography of teacher mentoring in Romania and the Republic of Moldova through the lens of Bruno Latour's Actor-Network Theory (ANT). In ANT, an actor-network refers to a material–semiotic assemblage in which agency emerges through associations among human and non-human elements. Rather than treating mentoring as a fixed institutional practice, the analysis conceptualises it as a contingent effect of these shifting assemblages of interactions among heterogeneous elements, including legislation, examination systems, mentor registries, school inspectorates, international organisations, professional discourses, material conditions and classrooms. These assemblages enrol and translate one another, producing temporary alignments that give mentoring its shifting historical forms. The study reveals that these configurations generate complex temporalities, where past arrangements persist and continue to influence current practices. In Romania, teacher mentoring has been predominantly framed as supervision, closely tied to examination practices and a centralised approach to teacher recruitment and validation of professional status. In the Republic of Moldova, it has often been conceptualised as professional support, aligning with Europeanisation discourses yet still marked by Soviet-era legacies. Notably, international agencies and geopolitical pressures emerge as powerful non-human actors, sometimes reinforcing and at other times destabilizing national practices. The paper argues that sustainable reform requires reconfiguring these actor-networks with attention to material conditions, temporal continuities, and geopolitical contexts. It proposes a research agenda informed by ANT that foregrounds translation, instability, and historical recurrence.

Keywords: teacher mentoring, teacher induction, Actor-Network Theory, Romania, Republic of Moldova.

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1. Introduction

Teacher mentoring and teacher induction remain significant concerns within education systems worldwide. Research across Europe and beyond indicates that mentoring enhances teachers' reflective practice (Attard-Tonna et al., 2017; Attard-Tonna, 2019), fosters collegial relationships (Betteney et al., 2018; Tynjälä et al., 2021), and promotes sustained professional growth (Aspfors & Fransson, 2015). However, the meanings and enactments of mentoring vary sharply across cultural and historical contexts. Romania and the Republic of Moldova (hereafter Moldova) illustrate these divergences: although both formally recognise mentoring in legislation, Romania tends to enact it as supervision linked to career progression, while Moldova frames it as collegial support. These differences signal the need for analytical approaches that take seriously the historical, institutional, and geopolitical dynamics shaping mentoring, tracing not only policies and pedagogies, but also the heterogeneous arrangements of material–semiotic assemblages in which mentoring emerges from associations among legal, institutional, discursive, and other human and non-human elements.

To address this, an Actor-Network Theory (ANT) approach it is proposed to argue that teacher mentoring is best understood as an outcome of complex, heterogeneous assemblages of human and non-human actors—such as teachers, mentors, inspectorates, examinations, policy documents, international reports, and material infrastructures—interacting to create what appear as stable practices. ANT challenges the idea that mentoring is a stable policy-defined practice and instead emphasises how it becomes stabilised through contingent alignments and recursions. Its non-linear conception of temporality (Latour, 1993) is particularly useful for examining how older arrangements persist or reappear in contemporary reforms. History involves recognising the relationships and combinations that lead to historical events, rather than unearthing a static past (Latour, 2005; Law, 2009, p. 141). Within this perspective, time is not seen as a linear journey from the past through the present and into the future but is instead characterised by multiple directions. Older arrangements become inscribed and reemerge, influencing current practices; conceptualisations and enactments of teacher mentoring are shaped by the connections between actors (human and non-human alike), creating a sense of temporality tied to the school environment and its history.

Geopolitical dynamics transport templates across borders, while projects and reforms continually appear, dissolve, and reappear in modified forms. Thus, past, present, and future coexist in turbulent flows rather than in orderly sequences. For example, Romania's nineteenth-century Europeanisation projects resurface in contemporary reforms (Mitescu-Manea, 2023); communist-era surveillance practices persist in post-2011 and post-2021 educational legislation on teacher mentoring in Romania (Mitescu-Manea et al, 2025); and Soviet legacies are evident in Moldovan discursive homogeneity (Kalimullin & Valeeva, 2023; Mitescu-Manea et al, 2025). ANT provides a framework for

interpreting these phenomena as outcomes of actor-networks that reconfigure temporalities.

Two central research questions guide the analysis:

1. In what ways do heterogeneous actor-networks—comprising legal texts, international reports, inspection systems, mentor registries, professional discourses, classrooms, and the material conditions that shape educational work—assemble distinct mentoring practices in Romania and Moldova?

2. How do these actor-networks generate complex, multidirectional temporalities, and how do geopolitical actors and transnational circulations mediate these temporalities?

The analysis is structured in five sections. The first situates the discussion within the broader literature on mentoring and induction, emphasising the unique contributions of an Actor-Network Theory perspective. The second section outlines the ANT theoretical framework, focusing on key concepts such as translation, enrolment, inscription, immutable mobiles, black-boxing, obligatory passage points, and turbulent temporality. The third section examines Romania as a case where mentoring for teacher induction has been institutionalised as supervision (Mitescu-Manea et al., 2025), highlighting the roles of historical imaginaries, examination systems, and school inspectorate oversight. The fourth section analyses the Republic of Moldova as a context where mentoring has been institutionalised as support (Mitescu-Manea et al., 2025), with particular attention to Europeanization discourses, Soviet legacies, and geopolitical factors. The fifth section presents a comparative analysis, demonstrating how temporality and geopolitics distinctly influence mentoring in each context. The conclusion discusses implications for policy and research, contending that mentoring should be reconceptualised to account for heterogeneous networks, multiple temporalities, and geopolitical complexities.

2. Situating teacher mentoring and induction in the literature

Research on teacher induction and mentoring has expanded significantly. European studies consistently emphasise mentoring as a valuable support for beginning teachers (Helms-Lorenz et al., 2016; Aarts et al., 2020; Shanks et al., 2022; Keese et al., 2023), often describing it as a reflective, dialogical process situated within professional learning communities (Heikkinen et al., 2012). Yet mentoring lacks a single, fixed definition; its meaning shifts across cultural, socio-political, and material contexts (Kemmis et al., 2014). At the same time, these meanings are not simply descriptive but are actively produced within institutions and policy systems that privilege particular practices and norms. Scholars increasingly note that mentoring is never a neutral or purely supportive practice; it is shaped by institutional expectations, policy pressures, and implicit hierarchies (Hobson & Malderez, 2013). These dynamics influence how mentors perform their roles and how mentees negotiate their emerging professional identities.

Policy discourses have reinforced the understanding of mentoring as one of the most effective support strategies for the professional induction of teachers. The OECD's

Teachers Matter report (OECD, 2005) and subsequent reviews (OECD, 2014, 2019, 2020) highlight mentoring as a crucial factor in enhancing teachers' knowledge and skills. European Commission documents (European Commission, 2010, 2018, 2021) position induction and mentoring as integral to the European Teacher Competence Framework, emphasizing professional learning, reflective practice, and supportive guidance. In practice, this is evident in classroom experiences, where teachers report increased confidence and competency after participating in structured mentoring programs. UNESCO (2015) has similarly underlined the role of mentoring in supporting teachers in low-resource and transitional contexts. However, these policy framings tend to present mentoring as uniformly benevolent, leaving less visible the power relations embedded in mentor–mentee interactions and the ways mentoring can operate simultaneously as support and as surveillance. This policy optimism also tends to obscure the institutional and political interests that shape mentoring systems, privileging particular forms of professional behaviour and tacitly reproducing existing hierarchies.

Research in teacher education has long highlighted these complexities. Sundli (2007) describes mentoring as a "practice of supervision," noting that mentors often act as agents of institutional control. Wang and Odell (2002) argue that mentoring tends to socialise novices into existing pedagogical cultures, privileging established norms and potentially constraining alternative forms of practice. Orland-Barak (2010) shows that the mentoring conversation itself is structured by subtle asymmetries, in which institutional and discursive expectations shape whose knowledge counts, how problems are framed, and what constitutes "good teaching." Across these studies, power is understood not only as overt authority but also as embedded in everyday language, routines, expectations, and material artefacts. Nevertheless, much international scholarship continues to assume stable institutional environments and linear professional trajectories, presenting mentoring as a predictable career stage rather than a relational and context-dependent practice shaped by shifting policy, organisational pressures, and material conditions.

These dynamics can be further intensified in Central and Eastern Europe, where educational systems carry histories of bureaucratic oversight, surveillance, and centralised control (Cantir & Kenedy, 2015; Kalimullin & Valeeva, 2023; Mitescu-Manea et al., 2025). The historical and geopolitical complexities of education systems in Central and Eastern Europe are often backgrounded, and when acknowledged, they are frequently framed in deficit terms—systems "lagging" behind Western models (Silova, 2010). Such assumptions downplay how mentoring can reproduce institutional norms, reinforce evaluative hierarchies, or position beginning teachers as subjects to be corrected or aligned with dominant expectations. The history of teacher mentoring in Romania and in the Republic of Moldova complicates this Western-centred narrative. In Romania, teacher mentoring is tied to exams and probation, shaped by 1800s Europeanisation trends and communist-era surveillance and centralised control practices (Bădescu, 2011; Gallagher, 2005). In the Republic of Moldova, mentoring, unlike

in Western and Scandinavian models, is presented as collegial support but remains connected to Soviet-era uniformity (Cretu, 2014). In both systems, mentoring practices are intertwined with long-standing authority structures, bureaucratic procedures, and geopolitical influences, making power relations an integral part of how mentoring is enacted and understood. These examples underline that mentoring is deeply embedded in wider social and political histories, and that seemingly supportive arrangements often coexist with supervisory logics that shape how teachers enter and navigate the profession.

Taken together, this body of research suggests that mentoring is best understood as a socially and materially embedded practice shaped by organisational structures, historical legacies, geopolitical orientations, and circulating professional norms. It cannot be reduced to a set of supportive interactions; rather, it is a site where institutional power, teacher identity, and pedagogical expectations intersect.This framing highlights the need for analytical approaches that move beyond individual intentions or policy prescriptions to examine how power is produced, negotiated, and sustained through relationships among people, texts, technologies, procedures, and material infrastructures. Actor–Network Theory (ANT) offers such a perspective by conceptualising mentoring as an emergent effect of heterogeneous actor-networks, rather than an intrinsic or uniformly defined practice. ANT shifts attention from mentoring as a policy-designed intervention to mentoring as something assembled through translations, enrolments, inscriptions, and circulating artefacts. By tracing these relational processes, ANT reveals how certain mentoring practices become stabilised, how others remain fragile, and how institutional authority is performed and distributed across human and non-human actors.This allows for a more nuanced reading of mentoring as a relational and power-laden practice—one shaped by administrative histories, professional norms, international policy templates, and the material conditions of educational work.

An ANT reading makes several contributions to the literature. First, it treats mentoring as an achievement of translations, not an intrinsic practice. Second, it foregrounds temporality as turbulent, showing how past arrangements persist and return. Third, it highlights geopolitics as constitutive, rather than contextual: EU directives, OECD reports, donor projects, and Russian influence are viewed as actors within networks whose interactions shape the power-laden configurations through which mentoring is stabilised or destabilised.

Although ANT has informed numerous studies of teacher education, professional learning, and classroom practice (Fenwick & Edwards, 2010; Mulcahy, 2010; Guerrettaz, 2021), its application to teacher mentoring remains rare. The present analysis therefore fills an important empirical and conceptual gap. By examining mentoring in Romania and Moldova as an effect of translations, inscriptions, and assemblages involving legal texts, examinations, international reports, and material infrastructures, the study extends ANT into an area of teacher education research where its potential remains largely

unexplored, while also deepening existing sociomaterial understandings of mentoring (Sundli, 2007; Orland-Barak, 2010).

3. Methodology

Data

The data set consists of 129 documents, including 81 from Romania and 48 from Moldova. These materials are classified as policy documents, research studies, conference proceedings, nationally implemented donor projects, and international reports addressing teacher mentoring within the two national contexts. The analysis focuses on the period from 2011 to 2024 for Romania and from 2014 onward for Moldova, aligning with the formal recognition of teacher induction and mentoring in national education laws and heightened attention following the COVID-19 pandemic. The selection of documents for our data basis followed the Preferred reporting items for systematic reviews and meta-analyses (PRISMA) protocol (Moher et al., 2015), guiding the identification and selection of relevant articles from databases such as Web of Science, SCOPUS, and CEEOL, EBSCO, Proquest, Google Scholar. The data search was performed between January and June of 2023. Given the scarcity of relevant entries in the major citation databases, the search was extended to the Moldovan national bibliometric index (https://ibn.idsi.md/) to avoid linguistic overlap and increase contextual coverage.

Search terms included combinations of "teacher mentoring," "teacher induction," "professional insertion," "beginning teachers," "Romania," and "Republic of Moldova", in English and in Romanian. Documents were screened for (1) accessibility, (2) thematic relevance, and (3) explicit reference to mentoring, induction, or teacher professional development. Duplicate items identified across databases were removed manually. A list of document types included in the analysis is provided in Annex 1.

To complement the documentary analysis, interviews with beginning teachers from earlier studies (Mitescu-Lupu, 2012; Mitescu, 2014) were re-examined. Given the temporal distance between these interviews and the present study, they were treated not as primary empirical material, but as contextualising data that illuminate the lived experiences of mentoring within the period when mentoring frameworks were first formalised. Their function was to attune the analysis to how mentoring practices—and the policy developments shaping them—were being enacted and negotiated within the unfolding time-space of the interviews, refining the interpretation of mentoring instantiations as they emerged in the time-space of the interviews, rather than to serve as a source of up-to-date accounts.

Analytical Framework: Actor-Network Theory and Turbulent Temporality

Six key concepts structure the analysis. At the heart of ANT is *translation* (Callon, 1986), the continual negotiation through which actors redefine one another's interests. In both countries, translation is visible when Romanian ministries reinterpret European Union

quality discourses as forms of probationary supervision, while Moldovan schools recraft legal mandates into practices of collegial support.

As translation unfolds, actors become drawn into particular arrangements through *enrolment*, a process in which roles are negotiated and stabilised rather than simply assigned. Thus, mentor registries in Romania do not merely designate teachers as mentors but help configure them as supervisors, while inspectorates emerge as gatekeepers of professional status.

These emerging arrangements leave behind *inscriptions*, the durable traces that give mentoring its solidity. Rather than functioning as a static list, these inscriptions accumulate through legal reforms enacted in 2011 and 2021 in Romania and in 2014 in Moldova, as well as through evaluation charts, examination protocols, portfolios, and donor project reports, each contributing to the stabilisation of particular mentoring models.

Some inscriptions travel widely. ANT calls these *immutable mobiles* (Latour, 1987): models that circulate while preserving their form. OECD and World Bank reports function as such mobile templates, shaping policy debates and reform trajectories in both Romania and Moldova.

Over time, these circulating and sedimented elements become taken for granted. Through *black-boxing* (Latour, 1999), networks solidify to the point where their origins are obscured. Mentoring as supervision in Romania and mentoring as support in Moldova thus come to appear natural, masking the contingent work that produced them.

Within these stabilised configurations lie *obligatory passage points*, the critical junctures through which actors must pass. Romania's *Titularizare* and *Definitivare* exams serve not only as evaluation mechanisms but as structuring gateways that align novices, mentors, and inspectorates. In Romania, *Titularizare* and *Definitivare* are two key national examinations that structure the early stages of a teacher's career. *Titularizare* is the national recruitment exam. It determines whether a candidate can obtain a permanent teaching position within the public system. A high score allows a teacher to become *titular* (permanently appointed), while lower scores restrict access to only temporary or substitute positions. It therefore functions as a major gatekeeping mechanism for entry into the profession. *Definitivare* is the professional confirmation exam, typically taken after several years of teaching. It certifies that a teacher has achieved a recognised level of professional competence and allows progression to higher career stages. Passing the exam is required to remain in the profession long term and to access further professional development pathways. Together, the two exams regulate who enters, who remains, and how teachers advance within the Romanian education system, making them central obligatory passage points in both recruitment and professional development.

ANT also provides a distinctive approach to temporality. Rather than treating time as linear and singular, it highlights turbulence, recursion, and return. Reforms materialise as layered temporal flows, where older inscriptions persist and intersect with new actors.

Romania's reliance on supervisory exams revives earlier nineteenth-century and communist-era logics, while Soviet legacies of uniformity continue disrupting Moldova's more recent emphasis on support. In this sense, time becomes a field of whirlpools and rapids (Latour, 2005), in which multiple temporalities coexist and shape practice.

Taken together, these concepts offer a narrative lens through which to reinterpret the historiographies of mentoring in Romania and Moldova, foregrounding how networks assemble and disassemble, how temporal patterns recur, and how geopolitical alignments inflect mentoring practices.

Analytical process

The analysis unfolded in an iterative, multi-step process that combined inductive and deductive strategies. All documents were read multiple times and coded manually using a scheme that integrated ANT-informed categories—such as translation, enrolment, inscription, immutable mobiles, black-boxing, and obligatory passage points—with themes that emerged directly from the material. Coding proceeded through constant comparison within and across the Romanian and Moldovan datasets, enabling the identification of recurring patterns, contradictions, and country-specific dynamics. Actor-networks were then reconstructed by mapping key human and non-human actors, the inscriptions that stabilised their roles, and the relationships linking them. Interview transcripts from earlier studies were analysed separately, with attention to how they illuminated or complicated the documentary evidence given their temporal distance from the current policy landscape. Throughout the process, analytical decisions were documented through reflexive notes, and credibility was strengthened through triangulation across legislation, policy documents, donor-project materials, international reports, and research studies. The researcher's professional experience within the Romanian teacher education system, voluntary involvement as a mentor for graduates of one initial teacher education programme, and fluency as a native speaker of Romanian (the national language in both Romania and the Republic of Moldova) informed both data selection and interpretation, facilitating access to documents, sensitivity to contextual nuances, and awareness of historically embedded practices while maintaining critical reflexivity. Evidence presented in the findings reflects elements that appeared consistently across sources, played a central role within actor-networks, and were corroborated across multiple document types.

4. Findings

Romania: Mentoring as Supervision and the Return of Probationary Logics

Following the formal adoption of the notions of professional induction and mentoring for beginning teachers in the 2011 Education Law, mentoring was legally recognized in Romania's educational system. However, this inscription—while promising at the semantic level—did not materialise into stable practices. In ANT terms, the 2011 law

acted as an inscription that sought to enrol a network of mentors, schools, inspectorates, and policymakers, but the translation into practice faltered. The obligatory passage points of *Titularizare* and *Definitivare* exams, historically associated with supervision, became dominant actants, shaping how mentoring was enacted. These exams redefined mentoring not as a form of support, as intended in the normative text, but as a supervisory mechanism ensuring teachers' passage through bureaucratic thresholds. To illustrate, an excerpt from the Ministry Order 5485/2011 reads: "The trainee teacher benefits from support provided by the mentor teacher until obtaining the *definitivare* certification and the title of teacher with the right to practice in pre-university education, in accordance with the provisions of Article 241, paragraphs (4) and (5) of Law no. 1/2011" [excerpt form Art 23 (3) of MO 5485/201]. The denominator for beginning teacher in the normative text is "trainee teacher", indicative of the type of enrollment intended for induction as an initial, school-based stage in the continuing professional development of the beginning teacher.

Empirical data from the policy reports (RO-55; RO-09) show that while legislation guaranteed every novice teacher a mentor, the enrolment of mentors into functioning networks remained uneven. Beginning teachers frequently reported not having an assigned mentor or having one in name only. As one teacher noted, "I was told who my mentor was after several months, but we never met" (RO-37). This underscores how the legal inscription lacked the material and relational infrastructures required for stabilisation, revealing mentoring as a fragile network effect rather than an implemented practice. The network thus remained fragile: the legal text existed as an immutable mobile circulating across ministries and inspectorates, but its translation at the school level faltered.

Between 2011 and 2016, the failure to implement mentor selection criteria (RO-09) further exposed this gap between inscription and enrolment. A report by OECD from 2017 (RO-48) reads: "*Mentorship, however, is not yet a fully functional induction support. A number of new teachers who participated in interviews with the OECD Review Team either had not been assigned a mentor or had only been assigned one "in theory". A policy setting out selection criteria and training for mentors has been released but not yet applied (Stingu et al., 2016). The Review Team found evidence that at least one County School Inspectorate (CSI) is conducting mentorship training, but this function has not been formally assigned to CSIs nationally.*" [Excerpt from policy report RO-48]. ANT helps reveal that this gap reflects competing translations rather than mere implementation failure: while the law used European policy vocabulary, the system defaulted to existing bureaucratic logics in the absence of clear role definitions, incentives, or training infrastructures. OECD and World Bank reports (RO-48; RO-49) served as immutable mobiles, traveling across borders and legitimizing reforms by invoking European norms. These reports did not simply convey best practices; they acted as powerful non-human actors that re-inscribed particular visions of modernity, positioning Romanian mentoring within a deficit frame relative to external models.

Historically, Romania's educational policy has relied on European arguments as sources of legitimacy, often without reference to indigenous evidence (Mitescu-Manea, 2023). In Latourian terms, "Europe" itself acts as a powerful actant, enrolling national actors through the promise of modernisation. Since the first Law of Education in 1864, Romanian reformers have drawn on European discourses to justify domestic change, using them as inscriptions of progress. Yet this orientation has often produced a 'deficit' translation: indigenous practices are frequently represented as less developed or outdated, whereas external models are elevated as exemplary and authoritative. After 2011, mentoring remained embedded in this deficit logic, stabilised not by demonstrated effectiveness but by the legitimacy of external inscriptions circulating as authoritative templates.

Throughout history, however, this almost constant reference to the European argument has not been matched by systematic use of evidence-informed or research-based arguments in the articulation of policy discourses. When research is mobilised, thematic analyses are scarce and often overshadowed by transnational comparative reports, which further amplify the prominence of external templates. This contributes to a policy tendency to frame innovation in teachers' professional development as a corrective response to perceived deficits in indigenous practices rather than an inquiry-driven exploration of local professional learning. For example, the policy document Memorandum Educated Romania (2021) reads: "According to Eurostat data and the *Education and Training Monitor*, Romania did not meet several important education targets set for 2020 [...]. Consequently, Romania is obliged to undertake a profound reform of its education system [...]. Therefore, taking into account both the need to continue and intensify national efforts to develop Romania's education system and the European recommendations, it is necessary to [...] Improving the quality of pre-university education in Romania through: [...] and training teachers to centre the teaching–assessment process on the needs of the pupil" [Excerpt from RO-75].

After 2021, the post-pandemic period introduced a new cycle of translations. Policies framed mentoring as a tool for professional development throughout the teaching career, linking it causally to improved educational outcomes and reduced dropout rates. In ANT terms, this expansion sought to redefine the network by enrolling new actors—ministries, universities, and EU-funded projects—into a broader system. Project PROF, for instance, trained over 28,000 teachers, producing new inscriptions in the form of certification documents and digital registries. Yet these new inscriptions reproduced earlier ambiguities: the 2022 National Record of Teacher Mentors lists over 4,000 mentors without specifying mentoring roles or competencies, creating confusion about responsibilities and professional expectations. To illustrate, the Ministry of Education Order 6173/2022 (RO-73) reads: ""Art. 4 – (1) Teachers who hold the status of mentor teacher coordinate the organisation and conduct of the pedagogical practicum within initial teacher education and/or the pedagogical practicum required for occupying a

teaching position, in schools designated as training schools or in school consortia coordinated by such schools" [Excerpt from RO-73].

The PROF-related policy documents also illustrate how centralisation and conceptual overlap shape mentoring practices. For instance, the proposed "collaborative learning communities" are operationalised as regional teacher gatherings resembling traditional Pedagogical Gatherings (transl. Ro. "*Cercuri Pedagogice*"). Simultaneously, mentoring is positioned as a vehicle for blended-learning implementation, suggesting a biased conceptualisation of learning communities as online information-sharing spaces rather than relational, dialogical environments. Such formulations reinforce transmission-oriented pedagogical traditions rather than supporting mentoring-as-learning. For example, Project PROF proposes as one of its' strategic goals to: "A5.1. Create the framework necessary for operationalising the institutional mechanism of career mentoring for the teaching profession in pre-university education, within the National Centre for Career Mentoring." (RO-57). On paragraph "5.1.2. Establishing the logistical framework at the level of the National Centre for Career Mentoring" it reads: "*The development and implementation of the support/infrastructure required for conducting distance-based teacher mentoring activities through multimedia tools is aligned with the European context of using modern learning methods. Distance learning within teacher mentoring, supported by technology, will enable teachers to acquire and develop the competencies needed in the broader global context of digitalisation. Implementing mentoring activities through technological means will develop, strengthen, and interconnect learning communities and the component entities of the teacher mentoring institution"* [Excerpt from RO-57, Structure of Project PROF]. The symbolic elevation of mentoring—as a prestigious, career-wide role—contrasts sharply with its limited functional enactment since its legal introduction in 2011, further revealing the political work done by policy inscriptions.

This expansion illustrates how ANT clarifies network turbulence. Each new actor—policy document, training centre, funding agency—attempts to stabilise mentoring but simultaneously multiplies contradictions. Universities and Teacher Training Centres were proposed as new infrastructural nodes; yet, their responsibilities overlap with those of inspectorates, creating contested zones of enrolment.

The persistence of hierarchical accountability in Article 72(4) of the Ministry of Education Order 4183/2022 demonstrates a form of black-boxing, as mentoring is equated with evaluation and compliance. The committees mandated to oversee mentoring replicate earlier surveillance logics rather than facilitating dialogical learning communities: *"(4) The responsibilities of the committee for teacher mentoring and career development are as follows: a) ensuring, at the level of the school unit, the planning, organisation, and implementation of activities related to teacher career development; b) carrying out the continuous training needs assessment at the level of the school unit; c) ensuring the evaluation of the extent to which teaching staff have met the training requirements and validating, after evaluation, the fulfilment of these requirements through*

the accumulation of the legally mandated number of transferable professional credits, including through the recognition and equivalence of credits obtained from participation in programmes for continuous professional development and career advancement; d) monitoring the impact of teacher training on the quality of the teaching–learning–assessment process and on pupils' educational progress; e) organising continuous professional development activities specific to the school unit—demonstration lessons, experience exchanges, etc.; f) implementing the training standards associated with the professional profile of teachers; g) providing guidance to teachers in the teaching–learning–assessment process, including in blended-learning or online systems; h) preparing the schedule of pedagogical practicum activities and monitoring the work of mentor teachers, in cases where the school unit functions as a training school; i) ensuring the organisation and implementation of mentoring activities specific to beginning teachers, in order to support them in taking the national definitivare exam required for practising in pre-university education." [Excerpt from Art. 72 (4) of Ministry of Education's Order 4183/2022 , RO-77]. In this process, the relational and reflective potential of mentoring is obscured under managerial language. Mentoring becomes a black box—a stable artefact whose complexity is hidden by bureaucratic form.

Despite these challenges, post-2021 discourses attempt to expand the semantic field of mentoring to include coaching, tutoring, and collegial learning. Some teachers describe informal collaborations that resemble mentoring-as-support, aligning with Kemmis et al.'s (2014) notion of mentoring as a form of collaborative self-development. Yet these forms remain marginal and under-recognised, often excluded from official inscriptions. The discursive ambiguity—where "mentoring," "coaching," and "training" circulate interchangeably—reflects unstable enrolments and incomplete translations.

Empirical examples underscore these tensions. Novice teachers in disadvantaged schools report being "assigned mentors on paper only" (RO-55), while mentors themselves highlight "lack of time or clear expectations" (RO-48). These examples illustrate failed enrolments: actors are named but not connected. When new national projects, such as PROF, are introduced, they enrol thousands into certification schemes but do not alter the structural conditions that shape the enactment of mentoring. Taken together, these patterns demonstrate how human actors (inspectors, policymakers, mentors, school leaders) and non-human actors (laws, exams, reports, certification registries, procedural templates) interact to assemble mentoring predominantly as supervision within a probationary logic. The resulting assemblage is fragmented, multi-temporal, and unstable—where supervisory, accountability-driven, symbolic, and emergent supportive logics coexist without consolidating into a coherent mentoring system.

Moldova: Mentoring as Support and Post-Soviet Translations

Mentoring in the Republic of Moldova is conceptualised around the relationship between an experienced teacher and a novice colleague. This relationship is consistently described

in policy and practitioner discourse as supportive, voluntary, and collegial. ANT enables us to interpret this network not as a stable institution but as a dynamic set of translations among mentors, mentees, policy documents, and geopolitical influences. The Education Code of 2014 serves as the primary inscription defining mentoring as a voluntary, service-oriented activity grounded in professional altruism (Article 4, MD-43). This inscription enrols teachers through moral rather than bureaucratic means, appealing to professional ethos rather than hierarchical authority. In practice, as several excerpts indicate, mentoring involves a combination of guidance, counselling, and observation: "Mentoring is a special relationship between someone with experience, willing and capable of offering support to a newcomer to the organisation" (Primary teacher, MD-25); "Training mentors implies knowing what is specific to the learning and development of adults and being thoroughly prepared to expand the mentoring relationship" (Researcher, MD-14). These voices exemplify how mentoring as support becomes a locally translated practice, enacted through interpersonal relations and reflective activities such as journaling and lesson analysis.

At the same time, ANT reveals that mentoring in Moldova operates through fragile enrolments. Although the law guarantees every new teacher a mentor, the OECD & UNICEF (2021) and European Training Foundation (2020) report that only a small proportion of schools systematically provide this support (MD-38, MD-36). The Education Code serves as an inscription that travels as an immutable mobile, appearing in donor reports and international analyses; yet, its local enactment remains uneven. Mentoring in Moldova thus materialises as a semi-stable network of promises, documents, and aspirations. Reports and practitioner accounts indicate that mentoring meetings often depend on individual initiative rather than systemic obligation, suggesting that while these practices can be relationally rich, they frequently lack institutional durability.

Historically, the Soviet legacy of uniformity and collective supervision shapes current translations. During the Soviet era, induction emphasised conformity, loyalty, and the collective ethos. Post-1991, Moldova attempted to translate mentoring into a European framework of reflective practice. However, Soviet inscriptions—procedural documentation, control-oriented evaluation—continue to circulate, influencing expectations of formality and compliance. ANT's focus on temporality clarifies how these older inscriptions persist and combine with new European scripts, creating what Latour calls "turbulent time." Mentoring simultaneously embodies continuity with Soviet pedagogical hierarchies and discontinuity through the discourse of Europeanisation.

The data also show how geopolitical alignments act as powerful actants within the network. Moldova's participation in OECD and UNESCO projects enrols international agencies as mediators shaping mentoring discourses. These organisations function as immutable mobiles, standardising terminology and procedures. Meanwhile, Russian commentaries position Moldova's educational reforms as destabilising the post-Soviet order (MD-08; MD-09; MD-10; MD-11; MD-12), introducing counter-narratives that

contest European influence (MD-09; MD-12). This geopolitical tension translates into practical ambiguities: while policy documents invoke EU standards (MD-43; MD-44), local schools often operate with hybrid practices that combine Romanian and Moldovan resources (MD-30; MD-35). Here, ANT captures the entanglement of local and international actants producing hybrid mentoring enactments.

Moldovan academic discourse further reflects discursive translations. Analyses frequently invoke mythological tropes, such as Telemachus and Mentor, to legitimise the concept both historically and culturally. This recurrent invocation functions as a symbolic inscription, stabilising the meaning of mentoring through a shared cultural reference, yet also constraining innovation by perpetuating formulaic narratives. Between 2014 and 2023, research outputs included in our dataset followed a consistent algorithmic pattern: referencing Greek mythology, citing the Moldavian Education Code, and aligning with Romanian and/or Western sources. ANT exposes this as a network of citations that constructs authority through repetition rather than critical reflection. The lack of indigenous research acts as a missing node in the network, weakening its local durability.

From an ANT perspective, Moldova's mentoring operates through multiple translations: from Soviet supervision to European support, from state control to donor-driven projects, from legal codification to moral obligation. The absence of a strong infrastructural framework reflects incomplete enrolment: mentors, schools, and inspectorates remain loosely connected. Following 2021, national recovery policies reiterated the importance of mentoring but retained its supportive rather than evaluative function, unlike Romania's supervision-oriented model. This difference demonstrates how distinct assemblages of actors—laws, reports, donors, cultural symbols—produce divergent mentoring enactments.

In summary, Moldova's mentoring network exemplifies a complex intersection of semantic, physical, and social arrangements. Its inscriptions—laws, mythological discourses, donor templates—circulate as immutable mobiles that enrol teachers into reflective but fragile practices. Soviet and European temporalities coexist, producing hybrid enactments. Through ANT, we observe that mentoring in Moldova is not merely a supportive practice, but a continually negotiated network shaped by goodwill, geopolitics, and the lingering turbulence of post-Soviet transformation.

5. Comparative Discussion: Turbulent Temporalities and Geopolitical Actors

Juxtaposing Romania and Moldova through an ANT lens reveals how different actor-networks stabilise divergent enactments of mentoring while being subject to shared geopolitical pressures and turbulent temporalities. This comparative pattern aligns with a substantial body of research showing that mentoring is not a neutral or uniformly supportive practice but a socially and institutionally mediated activity (Hobson & Malderez, 2013; Wang & Odell, 2002; Orland-Barak, 2010). In Romania, exams and inspectorates serve as obligatory passage points that enrol novices, mentors, and school administrators into networks of supervision. This reflects broader findings that

mentoring often operates as a mechanism of evaluation and control in systems marked by bureaucratic legacies (Sundli, 2007). In Moldova, by contrast, reduced workloads and collegial practices act as inscriptions that translate mentoring into support for adjustment and professional growth. These differences underscore the heterogeneity of mentoring: it is not a single practice but a contingent effect of the assemblages that give it shape. However, both cases illustrate what ANT and sociomaterial studies describe as the fragility of enrolment and the incompleteness of translation (Latour, 2005; Fenwick & Edwards, 2010). Laws circulate as immutable mobiles in both contexts, yet local enactments remain uneven and sometimes symbolic.

Temporality, in both cases, appears as turbulent rather than linear. Romania's present-day exam-centred mentoring black-boxes supervisory logics can be traced back to nineteenth-century Europeanisation and communist surveillance. Moldova's emphasis on support reflects a political will towards Europeanisation but is continually disrupted by the return of Soviet patterns of conformity and uniformity. Both cases exemplify Latour's notion that time is a flux of whirlpools and rapids, in which old inscriptions persist and re-emerge alongside new ones. These findings resonate with ANT-informed analyses that conceptualise temporality as recursive and layered rather than sequential (Law, 2009),and contribute empirical grounding to this theoretical claim.

Geopolitical alignments further shape these networks. Romania's EU integration, and its reliance on OECD and World Bank benchmarks, has embedded mentoring in a quality-assurance narrative, echoing research on how transnational governance reshapes national teacher policy frameworks (Grek, 2020). Moldova, positioned between European and Russian spheres, navigates competing translations: Europeanisation projects enrol it into reflective mentoring paradigms, while Russian commentaries resist and reframe these as destabilising. Thus, mentoring becomes an arena of geopolitical mediation, where international templates, donor funding, and national identity struggles shape local educational practices.

Material constraints cut across both contexts. In Romania, examination systems and registries create an illusion of comprehensive mentoring networks while concealing limited enactment in schools. In Moldova, donor-funded initiatives promote support but rarely achieve sustainable infrastructures. ANT highlights these failures not as simple policy gaps but as moments of disrupted enrolment and unstable translation, underscoring the inherent instability of these networks.

In summary, this comparison suggests that mentoring in Romania and Moldova extends beyond policy formulation. It involves complex negotiations among actors, as well as inscriptions and translations, across temporal and geopolitical contexts. Consequently, mentoring emerges not as a linear and unified reform, but as an unstable configuration within dynamic networks, where historical legacies and external influences continuously reshape local practices. Material constraints, too, exert a common influence. Romania's registries and exam systems create an impression of completeness, yet the absence of resources and training reveals how limited enactment can be. Moldova's

donor-supported initiatives advance mentoring rhetorically but struggle to sustain it structurally. ANT interprets these challenges not simply as failures of policy but as moments when enrolments collapse and inscriptions lose durability. Each national system survives through negotiated configurations rather than through enduring institutional reform.

Ultimately, mentoring in both countries exemplifies Latour's notion of turbulent temporality—simultaneously oriented toward progress and haunted by returning pasts. The assemblages that sustain mentoring—legal texts, bureaucracies, reports, and international frameworks— move more like shifting currents than along a fixed, linear path. In this sense, mentoring becomes a living process of negotiation among history, geopolitics, and educational reform.

6. Conclusions: Policy and Research Implications

The comparative analysis of Romania and Moldova, conducted through the lens of Actor-Network Theory, yields several key conclusions that are relevant to both policy and research. First, mentoring should be understood not as a linear or unitary solution, but as the contingent outcome of heterogeneous networks of actors—ministries, inspectorates, mentors, novices, laws, exams, donor projects, and international agencies. Any attempt at reform must therefore engage with these networks as dynamic, fragile, and historically layered.

From a policy perspective, three implications stand out:

1. Attending to Network Complexity. Effective reform requires acknowledging mentoring as a negotiated assemblage. Romania might rebalance its emphasis on exams and supervision to create space for mentoring as support. Moldova, conversely, needs stronger infrastructural commitments to transform goodwill-based mentoring into a sustainable system.

2. Recognising Turbulent Temporalities. Both cases demonstrate that returns of the past haunt mentoring reforms. Romania's supervisory logics draw upon nineteenth-century Europeanisation and communist surveillance, while Moldova's supportive practices remain entangled with Soviet legacies of conformity. Policy efforts should work with these continuities, fostering reflection on inherited practices instead of assuming that progress automatically erases them.

3. Accounting for Geopolitical Entanglements. Romania's EU integration anchors its reforms within European quality frameworks, while Moldova's position between the EU and Russian spheres exposes mentoring practices to competing translations. In both contexts, policies need to become more sensitive to geopolitical pressures, ensuring that external models are adapted thoughtfully rather than adopted uncritically.

For research, ANT encourages detailed, ethnographic attention to how mentoring is enacted in practice—how mentors, mentees, documents, and infrastructures interact over time. Studying moments of breakdown or instability can reveal how educational reforms actually take hold, transform, or dissipate. Comparative work across post-

socialist and Europeanising contexts could further expose how temporal turbulence and geopolitical positioning shape professional development.

Ultimately, mentoring in Romania and Moldova should not be viewed in terms of a binary of success or failure. It is better understood as a continuing negotiation—a historically layered, geopolitically entangled, and socially distributed achievement. Recognising this complexity invites more human, reflexive, and contextually grounded policymaking and scholarship, sensitive to the rhythms and recursions that characterise teachers' professional worlds.

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ANNEX 1. General Description of entries in the data set: Romania (RO01-RO81) and Republic of Moldova (MD01-MD48)

Category	**Romania**	**Republic of Moldova**
Journal Articles & Conference Proceedia	47	35
International Reports	12	5
Policy papers	11	2
Donor projects	11	6

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Textbooks, Markets, and Meanings: Educational Reform in Postcommunist Romania

Dana SOLONEAN•

Abstract

In 1995, the Romanian government launched the first large-scale education reform since the fall of communism. Largely financed through a World Bank loan, the reform targeted the sector's core dimensions: mission, content, governance, and subjectivities. Textbooks were placed at the center of these transformations, with more than half of the total reform budget allocated to creating a free market for publishing companies responsible for producing textbooks and educational materials. This paper seeks to uncover the explicit and implicit rationalities that underpinned this decision. It argues that, in line with neoliberal ideology, textbooks were regarded as the most cost-effective investment in education. By the same token, the introduction of open competition in the private sector for the publishing, printing, and distribution of textbooks was framed as the most appropriate way to ensure higher textbook quality. However, the decision to prioritize textbooks was not solely driven by economic considerations. Drawing on critical approaches to textbook research, the paper contends that in the post-communist context, textbooks were seen as key instruments for disseminating the "legitimate knowledge" associated with the emerging political-economic order. However, the textbook reform could not have been carried out without the support of Romanian education specialists, who were both ideological and materially co-opted. Finally, the article highlights the inherent contradictions embodied in the 'textbook' in postcommunist Romania, particularly in relation to centralization, student–teacher relations, and social justice.

Keywords: textbooks, education reform, World Bank, Romania, neoliberalism

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Introduction

After December 1989, the National Salvation Front (FSN), the political organisation that took power, was in charge of establishing the new directives for education, as schools were soon about to reopen. Decision makers had to ensure a smooth continuation of the existing school year and to start adjusting the Romanian education system to the new social and political realities of the country (Georgescu & Palade 2003). The first official decisions came in 1990: in January the former Institute of Pedagogical and Psychological Research, now renamed as the Institute for Education Sciences (IES), was re-established after eight years of non-existence, and in May a government decision (GD 521/1990) addressed the urgent topic regarding the organisation and functioning of that school year. Throughout the first post-communist decade, IES remained one of the most influential institutions in reforming the Romanian education.

In the aftermath of 1989, the education sector experienced a wave of confusion and ambitious demands, reflecting the turbulence that also affected industry. Education became one of the most intensely debated issues of the time, a period marked by both euphoria and genuine civic engagement. Newspaper headlines vividly captured this atmosphere of excitement, when possibilities seemed wide open and everyone appeared invited to take part in the national debate on education.

However, as Badea (2002, p. 48) observed, "the battle was lost. The technical priorities were becoming more and more important: organizational culture and school management, curriculum theory. The time has come for experts, for structuring educational policies and for precipitating change." The "experts" Badea refers to were primarily from the World Bank, and the "technical priorities" represented neoliberal measures that sought to align education with the emerging political and economic order.

The World Bank undertook its first exploratory mission in Romania in 1991 and in 1992 opens its resident Mission. The same year the organisation publishes "Romania. Human Resources and the Transition to a Market Economy" a study that addresses the Romanian social sector and that has a substantial chapter dedicated to education. The focus on the social sector was justified by need to accompany the economic growth and rising living standards with affordable and effective policies and programs in the social sector. Education was high on their list of priorities because "systematic restructuring of social sector policies and programs (especially with respect to labour markets, education, and training) is vital to generate and sustain a supply response" (World Bank, 1992, p.2). In other words, a reform in the education and training sector was needed because it helped sustain economic growth by aligning the workforce available with the new market demands.

Transforming education and the other social sectors involved fundamental reforms in the way the state relates to the market and the civil society. The "competition state" called for a change in the conditions of governing and redrawing the public-private divide (Jessop, 2002). The above mentioned report lays down four directions that would alter

the organisation of social services provision: 1) reforming the policy framework to encourage cost-effective service delivery and ensure the smooth functioning of the market economy. 2) decentralizing management, operations, and financing. 3) privatizing services—or, as stated in the report, introducing multiple service providers to promote individual choice. 4) strengthening the role of NGOs in providing consumers with the information needed to make informed choices (World Bank, 1992). The allocation of scarce resources, privatization, individual choice, accountability, descentralised governance all are the part of the neoliberal economic vocabulary.

In many ways, that report laid the foundation for many of the education sector policy reforms that followed. The transition to a market economy needed more flexible, broadly skilled workforce that could adapt to changing market demands. Pedagogy, curriculum, textbooks, examinations, finance and management were the priority areas of intervention in pre-university education. The higher education sector would need to satisfy the social demand, so the government should encourage private higher education, under a regulatory framework, and cost recovery from the "consumers of education".

Following that initial research visit, experts from the Ministry of National Education and the IES, together with World Bank specialists, proposed a comprehensive reform of Romania's pre-university education system, called the Education Reform Project. In fact, Romania was one of the first Central and Eastern European countries to initiate a comprehensive, large-scale, World Bank financed education reform. The diagnosis outlined in the initial report was almost entirely incorporated into the reform strategy adopted by the Romanian Government two years later. While presenting the reform at international conferences, Cezar Bîrzea, director of the Institute for Educational Sciences, the organisation responsible for implementing the reform, clearly stated that the goal was to promote innovations rooted in neo-liberal ideology and the structural adjustment policies imposed by the World Bank (Bîrzea, 1995).

Although all elements of the reform were interconnected and considered crucial to its overall success, textbooks were viewed as the central component. Consequently, the largest share of funds, $39.3 million, was allocated to establishing a free market for publishing companies responsible for producing textbooks and other educational materials. It was argued that curriculum changes and teacher training initiatives needed to be supported by updated textbooks. As a result, educational materials were revised, and a new competitive textbook publishing market was created.

But how did the textbook come to occupy such a central place in the agendas of global actors in education? Why did the World Bank advocate for investments in textbooks in countries that already ensured universal access to educational materials? The following section outlines the Bank's rationale for investing in textbooks, while the next examines how this textbook discourse was applied in the Romanian context. The aim is to present an empirical study that explores the economic and social relations underlying the production and distribution of textbooks in post-communist Romania. Finally, I show how textbooks, as cultural artefacts, reflect the post-communist struggles over meaning

and how dominant groups during this period defined what counts as legitimate and truthful knowledge. However, prior to presenting the results, I take a necessary step back to clarify the conceptual framework and describe the methodology that led to these conclusions.

Textbooks as cultural and economic products. A literature review

Textbooks have increasingly attracted the attention of sociologists, especially following the publication of the now classical studies by Bourdieu and Passeron (1970, 1977), and by Bernstein (1971). Their focus on the mechanisms through which school systems contribute to the distribution of cultural capital mainly through language codes —and implicitly to the reproduction of social structures—has led sociologists to conduct extensive analyses of whose knowledge is taught and produced in schools, and what exactly constitutes *legitimate knowledge*. For most students, the textbook represents an entry point into particular fields of knowledge. Consequently, questions related to national, religious, and gender identity, within the framework of a specific ideal of citizenship, have also emerged (Hildebrandt-Wypych & Wiseman, 2021).

Initially, textbooks were relevant in this discussion primarily as physical objects through which the curriculum—that is, the knowledge of the dominant class—was materialized. Apple (1999, 2003) took this investigation further by posing a crucial question: how is the organization and distribution of textbooks mediated by economic and social structures, beyond the curriculum itself? In asking this, Apple starts from the premise that textbooks are embedded within a complex web of state–market relations. To fully understand the mechanisms through which textbooks contribute to the distribution of cultural capital, he argues, one must explore the tension between the "claims of commerce" and the "claims of culture". Apple thus invites us to view the textbook not only as a cultural artefact but also as a market commodity, an approach that sheds light on the political economy of schooling.

Empirical evidence supports this perspective. Today, textbooks are integral to the global publishing industry. There are increasingly few countries in which textbooks are produced exclusively by the government. For more than four decades, the trend in textbook policy has been toward greater liberalization (Yuriy, Ievgen & Zaiets, 2023). In this context, where the free market functions as the main mechanism for the production and distribution of school knowledge, the main policy variation lies in whether systems employ a list of recommended textbooks or allow schools complete freedom of choice (Yuriy, Ievgen & Zaiets, 2023).

However, this has not always been the case. Roldán Vera (2018) conducts a socio-historical inquiry into textbooks and demonstrates how their role in education has been shaped by the characteristics of specific historical periods and the values attributed to textbooks within them. Up until recently, many states invested heavily in the production and distribution of textbooks, viewing them as crucial instruments in the socialization of younger generations, a type of education that had nationalist underpinning. The situation

was very different in former colonies, where textbooks were predominantly supplied by foreign publishers as part of a textbook-centered pedagogy that introduced European languages as the medium of instruction and examination (Kumar 1986, Roldán Vera 2018).

Yet globalization and the spread of neoliberalism have shifted the center of gravity that the state once held in textbook policy. Supranational organizations such as the World Bank and the OECD have promoted global education policies designed to reduce the role of the state in educational provision. As a result, national control over textbook production has weakened, fundamentally transforming the textbook's function within the educational process.

Textbook privatization is most obvious in the former socialist countries (Roldán Vera, 2018). Following the regime changes in the region and the transition from a centralized system of "universal textbook provision" to policies of "textbook choice, partially covered by the family" national and transnational publishing companies began to compete for larger shares of the textbook market. Unlike other cultural commodities, the textbook market offers both profitability and stability, since its consumers —students and partly teachers—are continuously renewed with each generation (Apple, 2003). Thus, the decision to allocate more than half the reform budget to create a free market for the publishing companies in charge of textbook production is part of this larger changes in the global political economy of education under neoliberal governing.

Methodology

This research employs a qualitative multi-method design, comprising document analysis, archival research, and semi-structured individual interviews. To uncover the explicit rationales for financing textbooks, the document analysis focused on World Bank documents, including *Education Reform Project* (1994), *Human Resources and the Transition to a Market Economy* (1992), *Implementation Completion Report for the Education Reform Project* (2002), and *Evaluation of the World Bank's Assistance to Basic Education in Romania* (2007). Each policy document was examined using the concepts of *policy framework* and *policy text* as the main analytical lenses.

The *policy framework* refers to the underlying assumptions and problematizations that shape the formulation of a policy text and is part of a broader approach that Fairclough (1995) terms the "analysis of discursive practices," encompassing the processes of production, distribution, and consumption of texts. This methodological phase involved identifying and analyzing pre-existing discourses as reflected in World Bank education-related documents, particularly regarding textbook financing, in order to uncover the premises on which the coherence and structure of their policies were built. Furthermore, the analysis of the policy framework extended beyond uncovering the genealogy of "the textbook" as a discursive category to examining the specific historical

conditions under which this discourse emerged in Romania, and, consequently, the particular form it assumed.

The *policy text* analysis further investigated the latter aspect by examining various "proprieties" of World Bank reports—such as vocabulary, text organization, assumptions, and implications—to uncover the ideological underpinnings of neoliberalism in relation to textbook production. For example, the 1992 World Bank report arbitrarily assigned hierarchical positions to different countries, including Romania, based on their provision of textbooks. This hierarchy has clear ideological stakes as it is an attempt to legitimise power asymmetry. The focus on the "textbook" discourse history meant that findings were constructed through a continuous, interpretive argument rather than through thematic analysis. Since the study aimed to uncover how the idea of the "textbook" emerged, traveled, was domesticated, gained dominance, and ultimately became naturalized within the Romanian education system, the analysis went beyond examining data extracted from policies to examining newpaper interviews, biographical notes, expert articles, social interactions, etc.

To analyze the distribution and consumption of ideas, I used newspaper archives as a primary source. The main newspaper examined was *Tribuna Învățământului* (translated as *Education Tribune*), a publication dedicated to documenting the development and evolution of Romanian education. This newspaper was selected because it served as the principal communication channel for most decisions made within the Ministry of Education during the 1990s. It also published extensive interviews with pedagogical specialists, researchers, teachers, and students, while reporting more broadly on the state of education. Additionally, I examined articles from national general-interest newspapers that addressed the "textbook affair." Examples of such publications include *Curierul Național* (*The National Courier*), *România Liberă* (*Free Romania*), and *Dilema* (*The Dilemma*).

Finally, the finding presented here also draw on semi-structured interviews conducted with World Bank and government staff, most of whom were directly involved in the early reforms of the Romanian education sector. In total, I conducted ten in-depth, semi-structured individual interviews with purposively selected participants, chosen for their expertise and involvement in the education reforms. The interviews were conducted both in person and online between January 2024 and January 2025 and lasted between one and three hours. For the purpose of this article, I focus only on the information related to textbook writing and publishing.

Even though it relies on multiple sources of information, this research shares the common limitations of qualitative inquiry, including potential researcher bias and subjectivity, limited generalizability, and non-replicability. A particular weakness of this study lies in the fact that the newspapers reviewed often presented conflicting information about the topic of textbook privatization, each reflecting its own ideological stance. Another limitation is that the Ministry of Finance's online database provi des fiscal data for companies for only the past five years. Consequently, it is not possible to trace

the long-term evolution of the turnover of private companies involved in textbook publishing and provide concrete data related to their financial interests in this area.

This paper was edited with the use of AI. Specifically, I used ChatGPT to correct grammar and punctuation and, occasionally, to modify sentence structure. The prompts I entered in the chat box were "correct this text" or "improve sentence clarity," followed by a review and revision of the suggested changes. The AI-assisted editing process paralleled my writing process i.e. after completing each paragraph, I asked the AI to correct grammar and spelling. AI technology was not used in any other way during the research, analysis, or writing process.

Textbooks and the World Bank's Education Reform Agenda

The World Bank is the largest international funder of education and has a long-standing tradition of conducting sector analyses, providing policy advice, and offering technical assistance to developing countries. For many years, the Bank's main lending portfolio focused on large infrastructural projects in the so-called "Third World." Education entered its agenda through the lens of human capital theory (Schultz, 1961), which posits that knowledge and skills constitute a form of capital, and that investments in human capital lead to higher earnings for individuals and, ultimately, to greater economic growth.

The Bank's shift from "bricks and mortar" to "school textbooks and curriculum development" (Psacharopoulos & Woodhall, 1985) was accompanied by a series of empirical studies in developing countries that sought to identify which types of educational investments yield the greatest societal benefits. The issue of "education production" became increasingly prominent as the fields of economics and education became more closely intertwined (Brewer & Hentschke, 2010).

Underlying these efforts was the assumption that, to compete in a global economy that rewards higher qualifications, countries needed to build educational systems with market-oriented features—such as incentives and choice, competition mechanisms, decentralized decision-making, and a focus on efficient resource allocation. Consequently, decisions about how to produce "quality education" were often guided by an input–output framework, aimed at identifying the most cost-effective inputs (educational infrastructure, teacher training, textbooks, etc.) that could generate the best outputs, typically measured in terms of student achievement (Brewer & Hentschke, 2010).

Textbooks emerged as a strategic solution to a major challenge affecting the efficiency and legitimacy of the World Bank's education projects in developing countries. Earlier research had indicated that school-level inputs often had only a weak or insignificant effect on student achievement compared with family background (Psacharopoulos & Woodhall, 1985). In response, the World Bank supported a series of studies that demonstrated the strong impact of textbooks on learning outcomes.

Heyneman, Farrell, and Sepulveda-Stuardo (1978), in a comparative study across 12 countries, found that the availability of textbooks was the most consistent school factor associated with academic achievement. Furthermore, the authors concluded that investments in textbooks were more likely to produce measurable learning gains than other school inputs, such as smaller class sizes, higher teacher salaries, or additional teacher training. A later study conducted in part by the same authors, in the Philippines found that the positive effects of increased access to textbooks and learning materials were particularly pronounced among disadvantaged children (Heyneman, Jamison, & Montenegro, 1984).

From a financial perspective, textbooks occupied an intermediate category between recurrent and capital expenditures. Teachers' salaries, by contrast, were classified as recurrent expenditures. What's more, textbooks were also considered a cost-effective measure, as they were relatively cheap to produce. However, as Psacharopoulos and Woodhall (1985) point out, the crucial distinction lies not in the durability of an item, but in how it is financed. Capital expenditures fell under the World Bank's loan-financing framework, whereas recurrent expenditures did not. Textbooks therefore provided a means for the Bank to expand its lending portfolio while reinforcing its legitimacy as the global education trendsetter. As Psacharopoulos and Woodhall (1985, p 171.) note:

> If governments and international financing agencies recognize that educational expenditure produces long-run, rather than short-run, benefits, then they may be willing to finance a greater share of expenditure through loans.

By framing textbooks as a form of capital investment (at least the first purchase) and drawing on supporting empirical evidence, the World Bank began to emphasize textbooks and educational materials as the most cost-effective way to improve educational inputs. Consequently, since 1976, the provision of classroom materials has become a major component of the Bank's education loan projects. Between 1963 and 1969, none of the approved projects included specific support for classroom materials. However, by the early 1980s, textbooks and other learning aids had become a central element in two out of every ten projects financed by the Bank in the education sector (Heyneman, Jamison, & Montenegro, 1984).

With the fall of communism in Central and Eastern Europe, the World Bank drew on its prior experience with textbook provision and proposed a series of policies in Romania centered on curriculum reform. These policies aimed to channel both Bank and government resources toward textbook production. The World Bank specialist responsible for conducting the analysis of Romania's education sector, which served as the foundation for the forthcoming reform, was none other than Stephen P. Heyneman, who had previously advocated for investment in textbooks and educational materials on the grounds that they were not only essential tools for learning but also cost-effective investments in developing countries.

Despite later World Bank reports (for exemple the 2002 project evaluation report) suggesting that textbook privatization was initiated by the Romanian counterparts, newspaper archives reveal a different story. Following an initial meeting between

Romanian experts and the World Bank in June 1991, Sorin Cristea, then State Secretary for Pre-University Education, clearly outlined to the Romanian public the education agenda proposed by the Bank's experts for accelerating the transition. This agenda emphasized three main issues: the lack of alternative textbooks and supplementary materials, the overly early and narrowly focused vocational orientation in secondary education, and the limited access to higher education. [2]All these "problematizations" later became key areas of intervention supported through World Bank loans in the following years.

The interviews I conducted with World Bank staff suggest a partnership in which the state-owned publishing house (EDP), private publishers, and the Bank pursued largely converging interests, as the quote below illustrates. However, this partnership was characterized by a pronounced power asymmetry, both in its design and in its outcomes. In terms of design, the Bank held the financial leverage and institutional authority to impose conditionalities, which were explicitly detailed in the loan agreement.

> What's happening in textbooks and books. So, the editors from the Didactica [EDP] were struggling to put textbooks in schools and there were these first private publishers starting to do things that looked really nice, and who wanted to be part of this story. So, what is a pathway forward there? The head of editorial Didactical Publishing, who I remember at the time as a real gentleman…. he was part of these issues because he wasn't getting the money to produce the books. So, these were, we were partners in problem understanding, and in problem solving. (WB2, management, 09.04.2024)

It is also important to note that the 1990s marked the height of structural adjustment programs, a period when education reform constituted only a minor component within the broader macroeconomic restructuring of former socialist countries. In terms of outcomes, the privatization of textbooks ultimately benefited private publishers far more than the state.

Yet, Romania already had a well-oiled system of textbook publishing in place. Since textbooks were the main channel for teaching the official curriculum—a curriculum that also served as a tool of communist political socialization—the previous regime had invested heavily in ensuring that every child had access to a textbook. Although the general economic crisis of the 1980s affected the paper industry and led to efficiency measures such as the "principle of transferability", which required textbooks to be used by several generations, overall, textbooks continued to be made available reliably, regularly, and in sufficient quantities to meet curriculum requirements. The World Bank reports clearly states the numbers: approximately 400 titles are printed in 12 languages every year (World Bank, 1992, p. 79) which meant approximately 22 million new textbooks in 1991-1992 (World Bank, 1994, p. 6)

[2] The article entitled *Educaţie şi economie. Banca Mondială – raportul privind accelerarea tranziţiei în România* (*Education and Economy. The World Bank – The Report on Accelerating the Transition in Romania*) was published in *Tribuna Învăţământului* on June 17, 1991.

Table 1.

Number of print runs and titles published by EDP in the early post-communist years. Source: Interviews with Constantin Floricel, Director of EDP, as reported in Tribuna Învăţământului.

Year	Total Print Run	For sale	Textbook Titles	Rep. Moldova
1991	21.000.000	n/a	425	800.000
1993	20.000.000	2.840.000	425	1.150.000
1994	22.500.000	3.000.000	435	800.000

Moreover, the World Bank had prior experience working on education issues in developing countries, where textbooks served as the principal learning materials and were therefore the focus of major financial investments, whether by the state or through international aid donors. In contrast, Romania already had a well-established system of pre-service and in-service teacher training, and most schools were staffed with qualified educators. While it would be naïve to assume that there were no regional or institutional disparities in teacher qualifications or in the degree of reliance on textbooks as teaching aids, Romania's situation was nonetheless incomparable to that of countries lacking universal access to primary education. How, then, was the Bank able to transfer its "short education menu" (Heynemann, 2003) to Romania and still propose substantial investments in textbooks? The following section seeks to answer this question.

Textbook privatization in Romania

A partial answer to this question is that they first created a problem and then offered a solution to it. As I have shown previously (Solonean, 2023), in order to introduce policy shifts, Romanian education first had to be constructed as an object of knowledge. World Bank experts surveyed the sector and "diagnosed" its problems along with their underlying causes. Their discourse emphasized as dysfunctional precisely those features that the forthcoming reform was designed to address. Their neoliberal commitments informed both their policy approach and the framing of their examination.

As the first report states, the Bank's role was to "identify current waste in Romania's social sectors and suggest resource-saving measures" (World Bank, 1992, p.9). The organization of textbook production in post-communist Romania was identified as one such source of waste. *Editura Didactică şi Pedagogică*, the state publishing company, was considered inefficient in terms of service delivery and, as a result, was to be replaced by a system in which incentives and competition would produce better and more affordable textbooks.

Furthermore, the privatization of textbook production was expected to generate multiple options for each subject, thereby encouraging choice and responsibility at both the school and family levels. Finally, the introduction of a free market was anticipated not only to lower costs but also to improve the quality of textbooks in terms of paper,

graphics, and content organization. This last argument, in particular, resonated with the Romanian education specialists leading the reform, most of whom were affiliated with the Institute of Educational Sciences.

To further support their arguments, the Bank drew on a global classification system that ranked countries according to educational achievement in relation to textbook access and the availability of multiple options. According to this global scale, Romania was placed in the third tier, alongside countries such as the People's Republic of China and Indonesia, and below nations like Chile and Malaysia. At the top of the hierarchy were the OECD countries, characterized by individualized learning paces, detailed records of achievement, and broad access to visual materials. This discourse exemplifies what Boatcă (2006) describes as the simultaneous process through which post-socialist societies are assessed in terms of "catching up" with advanced capitalist countries while Eastern Europe's *Third-Worldization* becomes increasingly apparent.

The outcome of this representational framework was the decision to allocate the largest share of funds to establishing open competition in the private sector for the publishing, printing, and distribution of textbooks and educational materials. This initiative was expected to provide "greater diversity, durability, and higher quality of textbooks in all schools throughout the country." (World Bank, 1994) The "abolition of the state monopoly on textbooks" (p. 8) also meant that the government would no longer contract with any state-funded publishers within the newly established textbook market. In this new arrangement, the government's role was limited to setting the content specifications and evaluating the results of the textbook competitions. The next section examines this very issue: the evolving role of the government, and particularly its key actors, in shaping the national textbook industry. It explores their involvement as reformers, specialists, textbook authors, and publishers, and, in some cases, their simultaneous engagement in multiple of these roles and argues that their engagement in textbook production is illustrative of the larger struggles over meaning.

Textbooks and struggles over the legitimate knowledge

It is important to recognize that even before the World Bank's proposals became public, both teachers and education specialists were already advocating for the streamlining of textbooks—specifically, for the removal of content that exceeded students' levels of understanding or was purely descriptive. Communist-era textbooks were often described as encyclopedic, overly focused on memorization, and lacking visual appeal. The textbook publishing system was also criticized for relying predominantly on university professors as authors, many of whom had little to no contact with the realities of pre-university education. Furthermore, with the transition to capitalism and democracy, the content of education was expected to address new pedagogical priorities aligned with contemporary global concerns, such as education for democracy, environmental protection, and the civic formation of young people. The introduction of optional subjects

emerged as a direct consequence of the reorganization of school curricula, which in turn generated the need for new textbooks. As a result, over the next years, new textbooks were developed in subjects such as geology, psychology, Greek language, history of religions, art history, foreign languages, philosophy, and economics.

In this context, there was little conflict between Romanian specialists, teachers, students, and World Bank experts. In fact, one of the new government's first measures targeted the revision of existing textbooks. Efforts to depoliticize and de-ideologize the educational content began with textbooks, all of which were subjected to what was described as "a careful and radical reconsideration." Directives issued by the Ministry of Education called for the removal of activities and textbooks with ideological content, such as those for moral-political and patriotic education. Precise instructions were issued from the central authorities: all portraits and images depicting the dictatorial couple were to be removed from textbooks, as well as texts referring to the national anthem, flag, or the coat of arms of the Socialist Republic of Romania. All themes related to the communist struggle against fascism, the building of communism in Romania and the Eastern Bloc, and workers' movements around the world were also to be eliminated.

In addition, throughout the first post-communist year, textbooks became the focus of intense public attention due to ethno-political and religious controversies but also because national examinations were based on the content of existing textbooks. On private initiative, history and geography textbooks in Hungarian began to appear in several schools in Transylvania. Combined with other ethnic tensions, the so-called "Hungarian textbook scandal" further inflamed the nationalist sentiments of conservative parties. In the same context of ethnic fluidity and the reconfiguration of spheres of influence in Central and Eastern Europe, beginning in 1991, a large number of Romanian-language textbooks were shipped abroad for use by Moldovan students. The Orthodox Patriarchate began publishing books resembling school textbooks, focused on Christian moral education while newly established NGOs started developing textbook focused on applied economics. [3]

The battle over what constituted legitimate knowledge intensified over time, particularly as IES specialists, supported by the World Bank, initiated the curriculum reform. Alexandru Crişan, who had headed the National Curriculum Board since 1995, recalls meeting with the Ministry's director responsible for the education contents and engaging in a heated exchange over textbook reform. The director favored maintaining content that was rich in factual information, arguing that Western models did not necessarily apply to Romania and that skills such as critical thinking should be grounded in factual knowledge: "Would you like us to end up like the Americans who don't have a clue who Shakespeare or Tolstoy are, or where Romania is on the map?" (Bassler, 2005, p. 31). By contrast, Crişan, drawing on Western pedagogical approaches, emphasized the

[3] For example, in 1993, the *Junior Achievement Romania* organization was founded to introduce an *Applied Economics* program for high school students, providing both textbooks and teacher training as part of its educational initiatives.

development of competencies, such as "debate, conversation, polemics, exchange of opinions, listening to others, suitable turn-taking, and so on." (Bassler, 2005, p. 33).

But in no field was the debate more fierce than in relation to history textbooks. As Păraianu (2005) argued, textbooks were at the center of controversy after 1989 because they served as a primary instrument for shaping the political orientation of the new generations. He, like many others at the time, contrasted the old, ideologically driven history textbooks with the new versions that claimed to present the "true history" of Romanians. Although the public debate largely revolved around nationalist tropes, such as the inclusion or exclusion of information about major historical figures, a few historians went further, criticizing the broader framing of the textbooks. They argued that these materials emphasized individualism while marginalizing civic solidarity and that their content was Western-centered. [4]

From ideological conflation to material appropriation

Although both the grassroots initiatives related to textbooks and the central authorities sought to reform not only the content but also the system of textbook production, their visions of change were largely framed in terms of greater democratization and broader participation. For instance, in an early effort to update textbook content, the Ministry of Education invited English teachers from across the country to submit lesson examples for potential inclusion in the new textbooks. Sorin Cristea's proposal for democratization underscored the need to establish a representative institutional framework founded on the principles of democracy and pedagogical competence. He argued that curriculum and textbook committees should function as creative teams open to local initiatives, without "entitled authors" or fixed, definitive versions. Consequently, across the country, a series of debates on textbook design were organized, bringing together the Minister of Education, researchers from the IES, representatives of County School Inspectorates, textbook authors, and teachers. Participants emphasized the need to develop multiple textbook versions and to select the best ones through a competitive process. In this version, textbook authors would submit their proposals to the ministry rather than to a private publishing company. Their discussion didn't evolve around free market but around meritocracy and democratization.

As Ban (2016) argues, the common ground between the World Bank's neoliberal policies and Romanian specialists' calls for democratization and greater participation lay in their shared anti-statist sentiment. Although their motivations were quite different, the Romanian demand for the depoliticization of education converged with the Bank's so called technical solutions centered on decentralization and market-based interventions. This "great conflation" of neoliberalism with democracy was a key factor behind the

[4] Păraianu (2005) offers an overview of the different positions taken by Romanian historians on the textbook issue.

uncritical adoption of the textbook free market. The quote below enunciated by the same State Secretary clearly illustrates this point:

> A clarification is also needed in the area of organizing the textbook development process, by allowing the practically unrestricted participation of potential authors—individuals who are currently constrained not only by their own timidity but also by the anachronistic and closed nature of certain decision-making structures. The democratization of this activity goes hand in hand with efforts to identify new sources of funding. The experience accumulated worldwide is not to be overlooked in this respect either: "In order to improve quality and encourage the diversification of textbooks, it will be necessary to eliminate the monopoly over publishing" (see World Bank Report, 4–15, XI.1991).[5]

However, this ideological convergence alone does not fully explain the isomorphism that characterized post-communist Romanian reforms. Other equally significant factors included the material interests in the reform of many Romanian specialists and their intensive re-socialization into the neoliberal paradigm through training programs, study visits, and workshops.

Regarding the latter, the Bank mobilized funding from the U.K. Know-How Fund, the Japan Grant Facility, the British Council, and the EU/PHARE program to provide technical assistance to its Romanian partners (World Bank, 1994, p. 9). In direct relation to textbook production, the International Book Development organization and the Soros Foundation organized several symposia on textbook design, bringing together teachers, inspectors, and researchers from across the country.

Soon, public officials from the Ministry as well as specialists from IES were advocating for the abolition of the state monopoly on school textbooks, the liberalization of the educational publishing market, the abandonment of the single textbook system, and the revision of the textbook subsidy system to benefit families directly. Over time, many of Romania's most prominent education researchers became directly affiliated with the Bank, producing studies and articles that aligned with its policy recommendati ons. Their careers became deeply interconnected, as they moved between roles at the World Bank, IES, and the Soros Foundation, often holding simultaneous or successive positions within these institutions.

However, material appropriation extended beyond simply being on the Bank's payroll. To shed light on this aspect, it is necessary to understand the mechanism through which the textbook reform was set in motion. From an operational perspective, the textbook development process functioned as follows: the Ministry of Education organized a series of national tenders in which publishing companies submitted their textbook projects, including both content proposals and price offers for each title. Evaluation committees assessed the submitted materials according to well-defined

[5] Sorin Cristea, State Secretary, Ministry of Education in *Tribuna Învăţământului* no. 1, January 13, 1992.

criteria in two stages: first evaluating the content, then the price, and assigning a score for each. Based on the final ranking, the top three textbooks were declared winners. The publishing houses then printed 1,500 copies of each winning textbook, which were paid for by the Ministry of Education at the tender price. These copies were distributed nationwide, where teachers selected the textbook they preferred. Orders were then centralized by the Ministry and the publishing houses, after which the publishers printed the selected textbooks and delivered them to schools. The textbooks were purchased through the World Bank's loan at the tender price. The World Bank also determined the eligibility requirements and tender documentation for publishing houses.

As a result of the open competition for education-related books and materials, several major Romanian publishing houses emerged or developed, including Teora, Corint, Sigma, Humanitas, Aramis, Polirom, and All. Soon most of these publishing companies would join forces and form the Association of Pedagogical Publishers. As Romania's economic situation deteriorated and books increasingly became a luxury item, prompted many established publishers to shift their focus toward "essential books" — professional literature and school textbooks. Consequently, most publishing houses created dedicated educational departments and began producing textbooks annually, often prioritizing visually attractive and marketable editions to secure textbook contracts. This line of activity became one of their primary source of revenue and a strategic means of consolidating their positions within the Romanian book market.

Unfortunately, the Ministry of Finance's online database provides fiscal data for companies for only the past five years, making it impossible to trace the long-term profits of these publishing houses. Nonetheless, the information collected from newspapers, although incomplete, offers some insight in this direction. A ranking of Romanian publishing houses from 2005 illustrates the market landscape: with a turnover of €3,719,815, Polirom ranked first, driven largely by the success of its professional book series Collegium. In second place was Teora, with a turnover of €3,181,583, followed closely by Corint Publishing Group (€3,155,673) and Rao Publishing (€2,176,498). Humanitas occupied the fifth position, with a turnover of €2,047,394. All these publishing companies have an 'educational' branch in charge of textbooks and education materials.[6]

Although the initial procedure called for the approval of three alternative textbooks, soon private companies proposed a complete liberalization of the textbook market, arguing that limiting it to three per education level was restrictive, especially given that there could be multiple high-quality textbooks. The *Catalog of Alternative Textbooks 2000–2001*, published by the Association of Pedagogical Publishers, illustrates how the publishing industry flourished in just five to six years since the introduction of the reform. The number of textbooks available for each subject reveals a rather absurd situation: there were 23 English language textbooks for 9th grade and another 23 for 10th grade, as well as 15 mathematics textbooks for 9th grade and 29 for 10th grade.

[6] Wall-Street.ro. (2006, October 23). *Polirom, primul loc în bilanțul editurilor pe 2005*. https://www.wall-street.ro/articol/Companii/20887/polirom-primul-loc-in-bilatul-editurilor-pe-2005

Moreover, teachers have pointed out that the same author's name would appear on the covers of three or four textbooks for the same subject and grade level. A striking example is that of Mircea Fronescu, State Secretary at the Ministry of Education, who, in 1999, was listed as the author of four different physics textbooks for 9th grade. As a result of this situation, Minister Andronescu mandates in 2001 that schools adopt only a selection of the textbooks approved by the National Council for the Approval of Textbooks, a decision that subsequently prompted the Association of Pedagogical Publishers to initiate legal proceedings against the state, accusing the ministry of "brutal intervention in the mechanisms of the free market."

In the absence of a well-defined legal framework to define conflict of interests, some of the authors submitting proposals on behalf of publishing houses were individuals affiliated with the Ministry or the National Curriculum Committee. George Palade, Alexandru Crişan, Dakmara Georgescu are examples of individuals who simultaneously or consecutively held roles as researchers, reform implementers, World Bank consultants, and textbook authors.[7] The royalties that textbook authors receive from publishers range between six and ten percent of sales—a significant amount in the context of the economic crisis and precarity that characterized post-communist Romania. Beyond these direct financial benefits, authors also gain prestige, a form of symbolic capital that helps consolidate their position within the postsocialist context. Consequently, textbook authors "simply inundate the publishing house," as Diana Rotaru, Head of the Education Editorial Department at Teora Publishing, remarked in an interview with *Dilema*.[8]

Others benefit from the free market in even more direct ways. For example, Mihaela Singer joined ISE in the early 1990s after serving as a math inspector at the Bucharest School Inspectorate. She later became part of the national team responsible for preparing the TIMSS evaluations while also working as a World Bank consultant. Additionally, she and her husband became shareholders in Sigma Publishing Company, one of the leading textbook publishers. Sigma was among the companies supported by the World Bank through it's the textbook loan. Later, Singer leveraged her professional platforms to write and publish numerous articles advocating for the World Bank's educational reforms.

Asked whether it constituted a conflict of interest for Romanian specialists to simultaneously serve as World Bank consultants while having direct financial stakes as shareholders in private companies benefiting from the reform, such as publishing companies, a Bank representative responded that as long as it was legal under the national framework and competition rules were upheld, there was nothing objectionable. The absence of a legislative framework to curb the "primitive capitalism" that defined the 1990s (Georgescu, 2021) allowed public servants, such as those working for the IES to

[7] See, for example, the article published in *Evenimentul Zilei*, no. 2228, 21 October 1999.
[8] *Dilema.* No. 140, September 15, 1995.

benefit in a very direct, material way from the neoliberal reforms designed by the World Bank.

Contradictions and implications of the reform

Because no reform is purely technical but inherently political, in terms of who benefits and who loses, it is worth examining who the losers of this education policy were. I argue that those who bore the cost of the transition were the teachers, EDP - the state publishing company, and poor students.

Teacher's statute and teacher student-relation. As a result of this reform, a second major transformation occurred: the center of gravity in the education system shifted from the teacher to the teaching material—from the human to the object-product. Şerban Iosifescu, an education specialist affiliated with both the Ministry of Education and the IES, clearly articulated this problem. In several articles published in *Tribuna Învăţământului* he advocated for a shift in the focus of reform, arguing that[9]:

> the system has to be restructured around the initial and continuing professional training of educational agents. This also implies a change in funding priorities, with emphasis placed on human resources, while other resources—such as curriculum, tools, and textbooks—should be subordinated to this primary objective.

By shifting attention from the teacher to technology—a process that has only accelerated in recent years—we risk undermining the very aspects that make teaching and learning profoundly human endeavors. As one professor once stated, "There are no good teachers who can be hindered by a poor textbook, nor bad teachers who can be saved by exceptional textbooks." Ultimately, the question is one of priorities. In the teaching process, the most important element is the relationship that the teacher establishes with the student—a dynamic exchange of ideas, emotions, and responses. Education and learning are not technological processes, and no textbook, however well designed, can ever replace that relationship.

The current emphasis on digital tools in teaching—including AI, smart boards, communication platforms, and hundreds of learning applications—represents just the latest iteration of a long-standing trend in which technological solutions have been prioritized over consistent investment in the teaching force.

The question of EDP and state centralization: The criticism directed at the Didactic and Pedagogical Publishing House (EDP) related to its inefficiency was only partially justified. In 1990, approximately 300 million lei were allocated from the state budget for the printing of 25 million copies in both Romanian and minority languages. The newly printed textbooks were distributed free of charge to students, while a portion was made available for sale in bookstores. Although some textbooks arrived after the start of the school year, over 90% of the textbooks were printed in time. Additionally,

[9] *The Funded Monitoring of the Reform.* Article by Şerban Iosifescu, Tiberiu Mihail, and Adela Rogojinaru, *Tribuna Învăţământului*, no. 264, February 13, 1995.

most of the delays stemmed from the fact that printing took place in the same facilities that were now overwhelmed by the surge of newly established newspapers and publishing houses that had appeared after the fall of communism. In terms of paper, cardboard, and printing quality, these textbooks were indeed modest.

Since its founding during the communist period, EDP has operated on the principle of economic self-management, meaning that it funded its activities through the sale of textbooks and other publications. Yet EDP was responsible not only for producing textbooks but also had a long-standing tradition of publishing a wide range of educational materials, such as maps, charts, atlases, exercise collections, and workbooks. For example, throughout the 1990s, the publishing house participated in several international book fairs and received multiple awards for its atlas collection. In addition, EDP also produces textbooks for 14 national minorities, a role that none of the new publishing companies would take due to the low profits associated with small quantities.

More importantly, there is a contradiction between efforts to decentralize textbook production and simultaneous attempts to centralize the curriculum and examinations. Another key component of the reform was the introduction of a new examination system—the capacity exam—designed for entrance into secondary schools. These exams, national in scope, would be centrally graded in Bucharest and aligned with the unified national curriculum, covering all core subject areas. Under a system with uniform grading, it is unclear how multiple textbooks could accommodate the needs for individualized learning, teacher autonomy, or diversified educational opportunities the reform was promoting.

Social justice: Privatization neither achieved the anticipated reduction in textbook prices projected by the World Bank nor ensured their free distribution to all students. In 2000, the price of a special workbook ranged from 20,000 to 25,000 lei, while a foreign language textbook could cost over 200,000 lei. Since students have multiple subjects the total expenses for a family for purchasing the textbooks amounted to several million lei. For comparison, during the same year, the minimum wage fluctuated due to inflation—from 700,000 lei at the beginning of the year to 1,000,000 lei by its end (GD no. 101/2000; GD no. 1166/2000). The lack of free textbooks affected primarily students from disadvantaged backgrounds, who could not afford their cost. The safety net that the welfare state once provided has no place under neoliberalism, where the principles of profit, competition, and cost reduction dictate material distribution.

Moreover, while the public debate was dominated by discussions about alternative textbooks, many schools lacked even basic facilities, funding for maintenance and repairs being largely neglected. Meanwhile, illiteracy and school dropout rates emerged as increasingly urgent problems.

4. Conclusions

This paper examines the development of "alternative textbooks" and, consequently, the textbook market, as a result of the first reform project financed by the World Bank following the fall of communism in Romania. It argues that the introduction of alternative

textbooks—which became synonymous with education reform in post-communist Romania—served to obscure the fundamentally commercial nature of the textbook issue. Although their political motives may have differed, there was a clear ideological alignment between the World Bank and Romanian education professionals. Their shared perspective was rooted in anti-communist, anti-statist, and liberal-democratic rhetoric, emphasizing competence and meritocracy within the education system. However, beyond these common themes and ideological affinities, many local experts were motivated by the opportunity to advance socially and benefit in direct, material ways from the textbook reform.

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Romanian education under austerity: a critical discourse analysis of crisis talks and policy legitimation

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Abstract

This paper examines how austerity measures adopted in the Romanian educational system, in 2025, are discursively constructed through crisis talk - narratives that frame cuts and policy modifications as both inevitable and morally responsible. This research uses the critical discourse analysis method to analyse a corpus consisting of political speeches, public reactions of relevant stakeholders and legislative texts to identify hidden narratives and rhetorical strategies employed by the decision-makers throughout the summer of 2025, that are serving as a means of normalizing budgetary restrictions applied for the educational sector. The analysis highlights how governmental actors try to legitimize austerity as both inevitable and morally responsible, presenting sacrifice as a duty that must be shared collectively by all members of the society. Meanwhile, counter-discourses voiced by trade unions, NGOs, and representatives of students emphasize the consequences of the measures, social harm, erosion of trust, and the loss of dignity for teachers and students.

Findings of this study show that austerity in Romanian education is legitimized less through fiscal reasoning and more through a moralized scarcity discourse that presents solidarity, inevitability, and collective duty as common-sense truths. The paper represents a contribution to research on neoliberal education policies by demonstrating that austerity operates as a discursive mode of governance—one that defines what is feasible, narrows policy alternatives, and justifies resource redistribution in the name of efficiency, while also addressing a gap in the research that does not provide insights into the in-depth effects of austerity in education, besides the economic results.

Keywords: Romania, austerity, education, policy legitimation, discourse

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Introduction

The global COVID-19 pandemic and its impact on the economic state of the world, alongside with significant governmental and social changes worldwide stood at the core of a significant shift in the political and economic discourse worldwide – and Romania could not have avoided these effects. In response to the financial crisis, generated not only by the pandemic, but also by the precarious style of spending public resources for years, austerity measures became a part of the citizens' lives. However, this is not new, as austerity is proven to be a classical response of the Romanian authorities faced with economic stagnation. historical way of responding to economic stagnation in Romania. These measures, exactly like the ones adopted by in the aftermath of the 2008 financial crisis, triggered protests against them and/or against the governments, because the proposed intervention packages did not succeed in persuading citizens to accept them (Offe, 2013). This is why, throughout this paper, we are not referring to austerity just as a set of fiscal measures – cuts, wage freezes, tax increases – but as a true hegemonic and morally charged political discourse (Kelsey et al., 2019). This paper argues that this unique context of profound public distrust, along with protests organized by trade unions forced the officials to use a defensive, even aggressive at certain times, discourse and linguistic strategies to secure legitimacy for deeply unpopular measures.

Austerity began to be again present in Romania during the summer of 2025, after the Bolojan Government was sworn in. This happened after a year that felt, for the Romanians, like a true rollercoaster: 2024 started as a year of elections – European, parliamentary, presidential and local elections –, which created the platform for politicians to talk about economic growth, results of investments and plan for a more sustainable and disciplined fiscal plan. However, everything ended with a "political fiasco" (Cistelecan et al., 2025), because of the cancellation of the presidential elections. This was a turnover point for the Romanian society, which had the power to divide people and to significantly reduce the trust in the public authorities, which is a key pillar in the public reactions against the austerity measures. Therefore, the newly invested Government had to face significant critiques and public protests against their economic recovery plan that consisted of several austerity measures, one of the main reason also being the fact that the first austerity package targeted the education system, presented by all actors part of the Government as being a key priority for state's interventions and investments.. In line with how the existing literature on austerity discourse described the way in which such fiscal policies are presented, the Government tried to justify their fiscal choices by trying to present austerity as a prerequisite for economic growth, even though it was hard to bring in front of the population strong evidence of how consumption and investments can be seen as growing in the foreseeable future (Clarke & Newman, 2012). Moreover, there are studies that show how austerity measures are having much more contractionary effects rather than supporting the expansion of the economy (Guajardo et. al, 2011).

The imposition of the austerity program developed by the Bolojan Government was framed as a necessity to address the dangerous budgetary deficit, which reached more than 9% of the GDP in 2024. This was a result of a lack of budgetary discipline over the years and, as such, it triggered urgent pressure for fiscal consolidation. Because a public consensus on the measures was impossible, the Government decided to adopt the fiscal measures through an extraordinary procedure – the Government took responsibility over the projects in front of the Parliament, which means that, according to the Constitution, if no motion to dismiss the Government is passed by both chambers, the measures are automatically translated into law without the normal parliamentary debate procedures and voting. There were motions proposed by the opposition to dismiss the Government, accusing lack of transparency and alleged violation of constitutional procedures, but the Parliament rejected them, after the vote of the majority of its members.

Worldwide, the austerity-oriented measures that are specific to neoliberal policies made the system enter into a vicious circle, as Mavelli (2019) shows – governments are trying more and more to respond to social and economic crisis produced by neoliberal policies with nothing other than more neoliberal economic policies that are having huge risks for the vast majority of people, and this is also the case of Romania. Consistent with neoliberal patterns across Europe, the measures imposed by the Government led by Ilie Bolojan disproportionately affected the public sector, with the education system being identified as one of the first site of budgetary reduction. Some of the measures included in the fiscal package included: cuts in the hourly fees for teaching, increased workload for directors, inspectors and teachers, forced mergers of hundreds of schools across Romania, especially in rural areas, reduction in income for some categories of teachers and other employees from the education system (as a result of a reduction in the value of certain bonuses) and cuts in the budget for scholarships and other social assistance programs, without taking into account that the insufficient financing of the educational system is seen as one of the root causes of low educational achievements for students (OECD, 2025; Roman & Bulat, 2025). However, these cuts were presented as reforms aimed at optimizing the system.

Trade unions, associations of students, associations of parents and other visible and relevant NGOs quickly mobilize against the measures, framing them as unjust, socially harmful. As we will see further in the analysis, their discourse emphasized that government's austerity plans punished ordinary citizens, while leaving, at that moment, untouched some of the "black holes" in the public finance. These actors organized strikes and protests not only in Bucharest, but also in other big cities, with slogans directly connecting austerity to the erosion of dignity in the educational system.

The research design is guided by two interlinked research questions that oriented every step of the process, from the setting of the theoretical framework to the coding procedure and text selection. First, how is austerity in education discursively constructed, legitimized and contested in Romanian public discourse surrounding the measures included in Law 141/2025? This is a question that seeks to unpack both

rhetorical strategies employed by the speakers and legitimization techniques through which the authorities framed austerity as necessary, while simultaneously analysing how different stakeholders created counter-discourses. Second, how are education, teachers and students influenced by the austerity discourse? Having this question in mind, the representational dimension of discourse can be addressed, exploring the way in which not only the whole system, but also the stakeholders are perceived by the ones who impose the measures. Together, these questions ensure that the analysis goes beyond the identification of linguistic patterns to reveal the deeper ideological functions and social implications of austerity discourse.

Although austerity has been widely analyzed, existing research has paid less attention to the discursive strategies through which austerity measures in education are legitimized, particularly in Central and Eastern European contexts marked by political instability and low institutional trust. Much of the literature focuses on the economic consequences of budget cuts or the political strategies that accompany them, leaving underexplored the ways in which language constructs austerity as necessary, moral, or inevitable. This gap is also present in Romania, where austerity measures were introduced rapidly and amid overlapping crises, disproportionally affecting the pre-university education and, as a consequence, the part of the education system that enco making discursive struggles highly visible.

Theoretical framework

Discourse has triggered a lot of interest from scholars in the last decades, as it is seen not only as a mere language or text, but as a form of social practice that both reflects and actively constructs our reality, by outlining the dialectical relationship between language and society (Bhatia et al., 2008; Fairclough, 1995). One of the most debated conceptualizations of discourse was made by Michel Foucault, who described discourse as a system of knowledge, truth and power that shapes what can be said – explicitly or not – and thought in a society (Foucault, 2012). Similar interpretations were taken further by other researchers in different strings of thought (see Ball, 1993; Powers, 2007), while other scholars see discourse as a tool of legitimization and contestation of ideas, as it provides the necessary frames through which ideas can be interpreted (Schmidt, 2008) and used in different social interactions. Furthermore, power relations identified through discourse analysis show that discursive strategies can represent a mechanism for perpetuating inequalities, as the elites are the ones who control access to public mass communication (Van Dijk, 1993). Within Fairclough's Critical Discourse Analysis (CDA), discourse is understood as a socially situated form of meaning-making that both reflects and shapes wider social structures, power relations, and institutional practices. CDA views discourse not as a neutral medium but as a constitutive force that organizes social reality by privileging certain interpretations over others. It assumes a dialectical relationship between discursive and extra-discursive dimensions: language is shaped by material and institutional conditions, yet it also contributes to reproducing or

transforming them. Importantly, CDA carries an emancipatory dimension, seeking to reveal how dominant discourses naturalize particular social arrangements and foreclose alternative imaginaries.

As such, discourse is not merely a reflection of power but a site where power is exercised through the control of knowledge, access, and interpretive frames, as argued also by Van Dijk (2008). This perspective draws attention to whose voices are amplified in public debates and whose perspectives are marginalized or rendered unintelligible. In the context of this study, the dominance of governmental actors in shaping public narratives reflects not only institutional power but also their privileged position in defining what counts as rational, necessary, or responsible policy. This ideological function of discourse is particularly relevant in times of crisis, when claims to expertise and authority gain amplified legitimacy.

These perspectives enrich the understanding of discourse, but they also derive from distinct intellectual traditions that operate with different assumptions about power, agency, and the stability of meaning. Poststructural approaches, inspired from Foucault, emphasize how discourse produces subjects and governs what can be known or thought, whereas Critical Discourse Analysis places greater emphasis on how discourse is embedded in institutional structures and used to reproduce or challenge inequalities. These understandings can be very relevant if being linked, because without oversimplifying their differences, it creates a theoretical framework that is capable of generating a nuanced understanding of the implications of austerity discourse, especially in regards with the fluidity of discourse and its influence on government practices.

Beyond these definitions, discourse has been studied by scholars from different areas: sociology, political science, anthropology, linguistics, economics, communication sciences, each one of these being able to offer a different angle for analysing discourse and discursive strategies. This interdisciplinary approach is explained by the literature that outlines how discourse is embedded in existent institutions and social structures, but also has the potential to reshape them (Fairclough, 2013). The mutual relationship makes discourse, in the case of this paper, a key object of study, as the object of this paper is the financial measures adopted by the authorities in Romania. Discourse analysis is also a very commonly used method of study in the field of economics and economic policies, as scholars found that discourse has the potential to construct "*economic imaginaries*" (Jessop, 2010) that are used to justify or support public policies.

Crisis talk refers to the discursive process through which political and institutional actors construct a situation as exceptional, threatening, and urgent, thereby legitimizing rapid or extraordinary interventions. Recent scholars emphasize that crises do not simply exist "out there" but become politically meaningful through the narratives that define their causes, responsible agents, and acceptable solutions (Moffitt, 2016). Crisis talk operates, in the view of this paper, by framing structural problems as immediate emergencies, by amplifying perceptions of risk, and by simplifying complex socio-

economic dynamics into narratives of threat and response that need to be addressed by public authorities.

A more fine-grained understanding of how crisis narratives function within legitimation requires turning to Fairclough and Fairclough's (2012) *Political Discourse Analysis*, which offers important insights into how arguments for action are discursively constructed. Their framework highlights that political actors frequently mobilize crisis and failure not merely as descriptive categories, but as justificatory resources that create a sense of necessity, urgency, and moral obligation. In this model, crises are often attributed to non-systemic causes—such as the moral, managerial, or intellectual failings of particular actors—thereby generating a moralized tone that positions corrective action as the only responsible course available. This perspective is particularly relevant for interpreting Romanian austerity discourse, where governmental actors framed the budget deficit as the outcome of unsustainable or irresponsible decisions, and where appeals to rationality, decency, and duty were used to legitimize immediate fiscal intervention.

However, discourse does not refer only to verbal communications. A comprehensive analysis focusing on discursive strategies should also interact with texts that, from a policy perspective, for example, can offer significant insights into which (and even why) specific parts of policy problems, goals and results are being addressed directly, and which are being avoided (Saarinen, 2008).

Van Leeuwen's (2007) typology of legitimation, which distinguishes between authorization, moral evaluation, rationalization, and mythopoesis. These strategies illustrate how actors justify social practices by invoking authority, ethical values, technical necessity, or narrative coherence. This framework is particularly insightful for understanding austerity discourse, where moral evaluations ("responsibility," "decency"), rationalizations ("efficiency," "optimization"), and appeals to inevitability operate simultaneously to construct austerity as the only viable response to crisis.

To uncover the discursive strategies through which the Government of Romania attempted to legitimize austerity measures and the means by which different stakeholders resisted, this paper adopts Fairclough's framework for Critical Discourse Analysis (CDA) (Fairclough, 1995, 2013). According to him, CDA operates at the intersection of language and society, providing links between micro-level (linguistic strategies) and macro-level (social structures, institutions). This is why his technique of CDA offers researchers an opportunity to understand not only the internal mechanics of language, in its all forms and shapes, but also the broader ideological functions discourse can perform. Later evolutions in literature showed in order to properly understand discourse and to apply a correct CDA technique, historical and social context must be taken also into account because of the legacies and institutional memory that has an impact on the discursive strategies employed (Reisigl, 2018).

Literature on austerity has repeatedly demonstrated to us that discourse is one of the key instruments through which the leaders are trying to legitimize their measures.

Blyth (2015) showed how austerity narratives that portrayed the fiscal measures as being normal and effective became dominant in the aftermath of the 2008 financial crisis, despite limited empirical or factual evidence of efficiency. Austerity discourses rely heavily on moralized language, as a general characteristic, framing the need of citizens to *tighten their belt* while waiting for the government to complete their protective role in relation with the state economy (Kelsey et al., 2019). Further studies concentrating on the austerity measures adopted by the Member States of the European Union suggested that after the widespread of the austerity measures in Europe, the rhetoric of the national authorities is linked, in an attempt to legitimize their measures, with appeals to the need of European integration and modernization, trying to make fiscal discipline appear as a mandatory step toward respecting the rules and regulations of the European Union (Afonso et al., 2015; Ladi & Tsarouhas, 2014).

Despite the breadth of scholarship engaging with discourse, legitimacy, and crisis rhetoric, relatively little research has examined how austerity in education is discursively constructed in contexts such as Romania, where institutional fragility and contested reforms make rhetorical strategies especially salient. This study positions itself within this gap by analysing austerity as a discursive mode of governance, focusing on how different actors construct necessity, responsibility, and moral duty in order to legitimize or challenge policy measures. Through this lens, the paper seeks to connect broader debates on neoliberal governance with the micro-level discursive practices.

Taken together, these theoretical perspectives create a multidimensional framework for analysing austerity discourse, because it helps this paper to approach austerity not solely as an economic intervention but as a discursive project whose legitimacy and effects emerge through ongoing struggles over meaning.

Methodology

From a methodological perspective, this paper adopts qualitative research designed rooted, as mentioned above, in Critical Discourse Analysis (CDA) techniques, that is found to be an efficient method to understand links between "*language and social configuration of education*" (Bukhari & Xiaoyang, 2013). Rather than treating austerity solely as a set of economic measures, this approach examines austerity as a hegemonic discourse: a system of ideas, frames, and rhetorical strategies that construct social reality and justify controversial policy interventions. By applying this method, this study will explore how the Romanian Government and other relevant stakeholders framed austerity in 2025, in a context marked by institutional instability and public distrust. The analysis will follow Fairclough's (1995) model, which involves: (a) textual analysis, in order to identify linguistic features and their impact; and (b) Discursive practice, that examines how discourse is produced, delivered and challenged.

However, even though Fairclough's model also includes references to social practice, for the scope of this paper, the analysis will focus only on textual and

discursive practices, leaving the broader dimension of social practice for a possible future research.

The empirical material for this study was collected from three categories of sources, as follows: (a) The austerity legislation affecting the education system in Romania: Law no. 141/2025; (b) Governmental discourses: parts of official speeches delivered by Prime Minister Ilie Bolojan, Minister of Education and Research Daniel David and other officials on this matter; press releases from the Ministry of Education and Research; and (c) Counter-discourses: parts of public statements and press releases from trade unions, students'/parents' associations.

In order for a material to be included in the analysed corpus, it had to respect the following criteria: timeframe (June-August 2025, the period immediately following the debates and adoption of the austerity measures); relevance (fragments of texts and speeches included are referring explicitly to austerity, fiscal consolidation, education cuts or public protests triggered by the measures proposed by the Government); and visibility (texts and speeches included have to be delivered by individuals/organization with a significant public outreach because of their positions/relevance/activity in the education system). It is important to note that the corpus is composed mostly of fragments of speeches/texts, as not the entire content of the speeches and/or legislation were included, because most of them were not referring exclusively to the financial measures concerning the education sector.

The resulting corpus consists of 8 elements, which were archived and coded systematically. Therefore, this article focuses rather on interpretive depth over breadth. The objective is to understand in detail, as much as possible, how the Romanian Government discursively constructed what I call *education under austerity*, and how other relevant stakeholders resisted, reframed or even unconsciously or indirectly legitimized the measures.

The texts were chosen to capture a clear overview of the heated debates on the austerity measures implemented in the educational sector, with texts being selected from every relevant stakeholders involved in these discussions, giving it a heterogenous character in terms of both actor type and textual source. Thus, Table 1 is beyond descriptive – it provides this paper with the analytical foundation for the coding scheme and interpretation that will be detailed below.

Furthermore, the next step in this analysis was to develop a concise and easy-to-follow coding scheme that can help one capture recurring discursive strategies employed by different stakeholders. I chose to develop a coding scheme – detailed in Table 2 – that does not only take into account linguistic features, but one that is developed from the corpus itself and that identifies those properties of the texts that are used to frame problems in a certain way, legitimize certain decisions and policies and construct reality, and that can also outline the characteristics of the counter-discourses. Each code will be defined by (1) its meaning, (2) its discursive function, (3) linguistic indicators, (4) corpus correspondent examples, (5) the speaker who may employ a specific text.

Table 1 presents an overview of the corpus:

Table 1

Overview of corpus

ID	*Author/Source*	*Role/Affiliation*	*Type of text*	*Context*	*Date*
1	Anton HADĂR	President – Alma Mater Trade Union	Declaration (answer to journalists' question)	Debate on fiscal measures	31.07.2025
2	FSLI, FSESH, FNSAM	Joint Trade Unions	Official press release[1]	Contestation of the fiscal measures, request for minister's resignation	29.07.2025
3	Daniel DAVID	Minister of Education and Research	Official press release[2]	Crisis talk, explanation of state's inability to cover *unstainable increases* of specific measures	11.07.2025
4	Daniel DAVID	Minister of Education and Research	Official press release[3]	Crisis talk, framing education as part of the root causes of the deficit	07.07.2025
5	Ilie BOLOJAN	Prime Minister	Declaration (answer to journalists' question)	Framing scholarships and support measures for students as unstainable	02.07.2025
6	Law no. 141/2025	The 1st legislative package implementing austerity measures	Official legal text – justification note[4]	Explanation of the necessity of austerity measures: to avoid *blockage*, return to sustainability	25.07.2025
7	Ovidiu CÎMPEAN	Member of the Parliament	Facebook post[5]	Call for constructive dialogues and *reasoning*	12.08.2025
8	Protest signs made by students	Students (protesters from the Romanian National Alliance of Students' Organizations)	Public/Visual text[6]	Requests for finance increase for education, requests for cancelling Law 141/2025 and the austerity measures, comparisons with other public spendings	July-August 2025

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[1] Joint press release available at https://www.fsespiruharet.ro/comunicat-comun-domnule-ministru-faceti-un-gest-onorabil-si-prezentati-va-demisia/

[2] Press release available at https://www.edu.ro/press_rel_84_2025

[3] Press release available at https://www.edu.ro/press_rel_81_2025

[4] Justification note available at https://www.cdep.ro/proiecte/2025/200/30/0/em230.pdf

[5] Facebook post available at https://www.facebook.com/permalink.php?story_fbid=pfbid0mbQet8fRNgjFrPo3dkNg1fgn4NVazLdYoS2vpazWxpYStUezrt1FUwsfVQjR6Zd1l&id=100009054817941

[6] Photos available at https://www.facebook.com/anosr.ro/posts/pfbid02pNvq9RNqAEEjrNm8MjdsqvZFr1q5MozvAFTvpTSJ4xGCWdX1V7MbEMcd5Kdjh6jVl

Table 2

Coding scheme

Code	*Label*	*Explanation*	*Discursive function*	*Linguistic indicator*	*Example*	*Typical speakers*
SCAR	Scarcity + appeal to rationality, decency	Discourse that frames austerity as unavoidable due to the financial scarcity and that makes constant appeals to rationality and decency	Justification of austerity measures by normalizing budgetary limitations	"unsustainable", "the country cannot afford", "rationality and decency"	"These measures were taken in a context governed by the need of rationality and decency" (Minister of Education and Research)	Government officials
SOL	Solidarity, collective duty	Appeals to collective sacrifices	Encourages compliance with the measures	"together", "solidarity"	"We can only exit this scenario together!" (Minister of Education and Research)	Government officials
EFF	Efficiency	Justifies austerity as a technical optimization of public finance spending	Normalizes cuts as measures to optimize and, in the end, develop the financial situation of the country	"efficiency", "optimization"	"Education had a role that we need to correct through efficiency measures" (Minister of Education and Research)	Government officials
THR	Threat/consequence	Uses threats and warnings of severe consequences that may happen if people do not accept the austerity measures	Pressures the society into accepting the measures	"collapse", "blockage", "difficulty in paying salaries"	"To avoid a blockage there is a need of immediate action" (L141/2025)	Both sides

Findings & discussions

This section will present the results of the CDA technique applied for this research. The coding scheme will serve also as a framework for organizing the discussion about the findings. Each discursive category will be discussed here in turn.

A. Scarcity

An important finding of this study is the constant use of scarcity-related discourses that are constantly used in pairs with constant references to either rationality or decency, as the mean to legitimize the austerity measures implemented in the education system in 2025. The officials presented the measures so that they can frame austerity as the only rational response to the financial burden of the state that has already been described as exceptional and, most importantly, dangerous by the authorities. From the point of view of hidden meaning, I identify a dual function of this framing: on the first hand, it constructs the financial scarcity as a reality that cannot be controlled through political agency, so even if the politicians would want to engage in taking measures that can support the development of the economy, they would not be able to. On the other hand, it moralizes compliance – acceptance of scarcity and austerity measures is presented as

the only *decent* and *responsible* path the state can take. With this mind, the government is trying to normalize austerity and to move it from the realm of a heavily contested policy in the sphere of common sense.

The discourse of scarcity has been evident in the words of Minister Daniel David (ID 4) and in the Prime Minister Bolojan's reactions (ID 5), who described the system as being burdened by unsustainable spendings throughout the years, suggesting that the education system contributed to the financial crisis in which the state is in.

> Although it is unpleasant to acknowledge, in the case of the huge budget deficit of 2025—which has brought us into this crisis and now exposes us to this risk—it must be recognized that education also played a role, especially through the unsustainable increases in spending on human resources and scholarship funds, aspects that must now be corrected through efficiency measures, thereby helping both the country and our own system. (ID 4)

> Another aspect concerns the reform of scholarships. I know this is not a popular issue, but we must once again be fair. In recent years, as I have already mentioned, there has been an unsustainable increase in scholarships. It is a very large amount that we simply cannot afford. We no longer have a clear understanding of what merit truly means (ID 5)

The recurrent usage of terms and phrases like "*unsustainable*" or "*cannot be sustained*" is, for the authorities, a way to achieve closure in the financial crisis: it limits alternative solutions by presenting their policies as the only acceptable path, an inescapable one. The moral value is given to austerity measures by Minister Daniel David's words, who described the fiscal package as:

> These measures were taken in a context shaped by (1) rationality – to remain within the limits of certain European benchmarks, and (2) decency – what the country can currently afford in a time of crisis, with the financial resources eventually being returned to the system (ID 4)

This combination of functions for these speeches and texts illustrates the interplay Fairclough presented between rationalization (in this case, legitimizing through necessity) and moral evaluation (in this case, legitimizing through ethical judgement). With this in mind, it is clear that it is not enough to see austerity as financially necessary; it also must be perceived as ethically and morally correct by the citizens, who are transformed into moral subjects.

Moreover, the Law no. 141/2025, the first fiscal package adopted by Bolojan Government and the one that introduces the austerity measures in education is itself constructing the financial reality in which the measures are taken in an inescapable context and that the only way to avoid a blockage of the system is to accept these measures (ID 6). In this case, the crisis is constructed in such a severe and dramatic

manner that the normal and democratic parliamentary process has to be avoided in order to impose the law. The whole text removes space for negotiation (as it mentioned constantly that the law should be imposed immediately), embedding scarcity in the legal framework of Romania. This text goes in line with Jessop's (2010) views on *economic imaginaries* – scarcity, in the case of the Romanian education, becomes institutionalized as the lens through which policies are understood and implemented and, also, becomes a form of governance in the system.

Of course, there are counter-discourses that are challenging this narrative employed by the authorities. Student protesters, gathered in the biggest university cities in Romania, reframed scarcity by linking its effects with the living reality of a student:

> For you it's a number. For me it's rent; You have a budget, we have problems; The state educates juts if it doesn't cost; If the Government fails, the students have to pay. (ID 8)

By looking at scarcity through the lens of those who are affected by it, the students are able to disrupt the economic abstraction of the government's discourse, as they are emphasizing the human and social costs of austerity measures. Unions too, through their public statements, are denouncing scarcity talk as a disruptive weapon that will generate important consequences for the education system. Through their communication, all counterparties are trying to suggest that a state in which investments in education are *unaffordable* is a state that sabotages its future and the lives of its citizens.

However, a more careful reading of the texts included in the corpus underlines an important aspect, that reveals how not all counter-discourses can fully escape the hegemonic logic that governs austerity. In the corpus, there is included a public statement (ID 1) made by Anton Hadăr, the leader of Alma Mater Trade Union, the representative union for university teachers, that states:

> I came here today with a student from Politehnica University, who said that he wants to stand next to teachers, to express his anger that he will not receive a scholarship during the summer vacation anymore. Thus, these measures are taken in a rush, without proper thinking, they did not talk with us about them. It is true, when it comes to pre-university students, the budget for their scholarships was higher, a cut was needed. (ID 1)

Hadăr's intervention exemplifies very well this scenario: while criticizing the Government for the cuts done in the higher education budget and because the measures were imposed without proper consultation, he indirectly (or unconsciously) legitimizes the cuts that were made in the pre-university education budget, which represented, ironically, the bigger "savings" source. His statement, even though it is framed like resistance, very effectively reproduces the logic of scarcity, by accepting that cuts are necessary, only if we relocate the target of the measures. This is why this statement can be easily transformed from a critical one to one that incidentally legitimizes the government's measures: his attempt to redirect the cuts from to university students to

the pre-university ones reflects an internalization of austerity as being inevitable, which can serve as a source for a new discussion: is, in fact, the unions' response a critique to austerity itself, or it is a question of distribution rather than a principle, as his statement seems to be weakening their radical view on the measures?

This finding complicates the binary and apparently simple relationship between government legitimization vs. union opposition, as it demonstrates how austerity has the power to colonize discussions and discursive fields, shaping the language that is used and dividing people into. What emerges from this discussion is not only a clash between pro-austerity and anti-austerity, but it is a very complicated field, a layered discursive terrain, in which the government narrative has the potential to dominate discursive strategies and languages to the point in which its premises can infiltrate even in the discourses of the opponents.

This dynamic resonates with discussions of discursive hegemony, where dominant narratives colonize the language of their opponents and narrow the horizon of alternative imaginaries (Fairclough, 1995; Gramsci, 1971; van Dijk, 2008). The partial uptake of scarcity framing within union discourse thus illustrates how austerity discourse operates hegemonically by shaping the very terms through which policies are being justified even though there is visible resistance from the public.

B. Solidarity and collective duty

Scarcity discourse employed by Government does not only justify it as being rational and decent, but it also does often and constant appeals to social solidarity in countering the effects of the financial crisis, in order to transform unpopular measures in a collective duty for each and everyone. The texts selected in the corpus are showing how the speakers are often talking about togetherness, sacrifice and responsibility in order to try and change the widespread image of austerity as being imposed from the elites, as it is outlined also in Offe's work (2013) and to outline how the acceptance of the measures is a shared project, in which every citizen has to carry their part of the burden if they do not want the whole system to fail. At the same time, solidarity is mobilized in order to diffuse blame, because by presenting austerity as a collective responsibility, structural inequalities of austerity measures are blurred.

Minister Daniel David repeatedly expressed this explicitly when mentioning that the only way out of the financial crisis is by working and staying together (ID 4). In this case, the pronoun *we* are a core component of the text, which dissolves the asymmetry and barriers that appear between authorities and citizens and portrays the actions as being a normal response to a challenge that affects everyone and that requires collective action:

> We are living in a crisis situation that none of us wanted. A situation from which we can only get out together, through solidarity and with rational and decent actions. We do it for ourselves but, above all, for the future of our children. (ID 4)

A similar discourse strategy was also employed by a Member of the Parliament, Ovidiu Cîmpean (ID 7), that was publicly constructing the austerity package as a necessity that should be based on collective responsibility and on constructive dialogue, as a response to the trade unions' request for the Minister of Education to resign and abolish the provisions of the Law 141/2025:

Children's interest must come first!

> In recent days, statements have appeared from some education union leaders regarding the possibility of blocking the start of the new school year. I understand the discontent and challenges faced by teachers, but I strongly believe that students should not become hostages of conflicts.
>
> Romania is going through a difficult period, which requires balance and responsibility from everyone. The real problems of education are solved through constructive dialogue, not through ultimatums.
>
> I appeal to reason let's put the children's interest first and find together solutions that improve the Romanian school, without sacrificing the beginning of the school year. (ID 7)

Moreover, it is interesting to see the link that the Minister explains between the present actions and the intergenerational results for the future of children (ID 4). This is a strategy that can create a moral trap: opposing austerity can mean opposing the wellbeing of children, endangering collective future. The literature on this matter describes these actions as being part of the moral justification and evaluation mechanisms that different actors use when they are trying to legitimize their actions through appeals to higher moral values, that can shift the people's attention from the technicalities and immediate consequences that a policy might have. (Van Leeuwen, 2008). However, this argument is in direct opposition to what the protesters (both students and teachers) are trying to outline – the fact that the education system demands increased financing to deliver quality education (slogan on this matter present in ID 8), which shows how intergenerational ethics are used by both sides, but with different meaning, depending on the interest and final objective.

The counter-discourses selected in the corpus reveal a contradictory nature of solidarity. For the affected stakeholders, collective solidarity does not mean compliance with the austerity package imposed by the Government, but collective protests and resistance against it. Their actions and their protests slogans (ID 8) show how the opposing stakeholders are trying to outline the unequal exposure to these measures and that, even if the Government presents austerity as a collective sacrifice, the consequences are disproportionally supported by certain categories of citizens – in our case, students and teachers. This is why solidarity gains a dual understanding: the same word is used by authorities to justify their actions to, as it is said, protect the economy, and by unions and

students to legitimize resistance to, as they say, protect the dignity and rights of the affected categories.

These dynamics illustrate the productive tension between discursive agency and structural constraints emphasized in both discursive institutionalism (Schmidt, 2008) and CDA. Government actors draw on solidarity as a moralizing resource to build consent, a strategy that aligns with N. Fairclough and I. Fairclough's (2012) argument that appeals to shared values often serve as justificatory premises for political action. Yet, the counter-discourses demonstrate that such moral vocabularies are never fully controllable. Teachers and students re-signify solidarity not as compliance but as collective resistance, challenging the state's monopoly over moral interpretation. This contestation underscores Foucault's insight that where power circulates, so does resistance; solidarity becomes a site of struggle in which competing actors vie to define the legitimate meaning of collective responsibility.

C. Efficiency

Another key discourse identified in the crisis talk was the efficiency discourse, that is reframing austerity as a rational optimization and modernization of public spending habits, as austerity is not presented as a set of budget cuts, but much rather as a way to optimize the well-functioning of the education system, to respect international benchmarks. In this case, this kind of discourse is portrayed as a technical adjustment, avoiding disclosing its political characteristics.

The Government officials articulated this type of communication when they argued that the financial measures were designed as correction measures:

> While it is not pleasant to admit, the massive budget deficit of 2025—which has led us into this crisis and exposed us to the current risks—must also be seen as partly resulting from education, through the unsustainable increases in personnel expenditures and scholarship funds. These are issues that now need to be corrected through efficiency measures, thereby supporting both the country and the education system itself. (ID 4)

In this scenario, the word *correcting* does not imply an innovative approach, but much rather an approach that tries to mitigate the financial risks, in order to return the system to its proper and historic balance that was present before the unsustainable funding increases suggested by the authorities. The speakers are using a much more technical vocabulary, similar to the ones used by the private sector (optimization, correction, efficiency etc.), that is truly impersonal and tries to strip austerity of its social costs, presenting it just as a matter of macroeconomic debates.

Yet the counter-discourses reveal that efficiency is a deeply contested narrative, by claiming that austerity undermines the very efficiency that the Government is trying to promote, stating that increasing workload, reducing bonuses and social supports may reduce the performance of the system in the long run. Additionally, students are trying to

outline one possible hidden inefficiency of austerity, that shows how budget reallocations prioritize the elites:

> Education is a priority, but after special pensions (ID 8)

The above slogan is used by the students that are protesting against the austerity measures to outline that the budget reallocations are only done in disadvantaged sectors and does not take into account, for example, judges and prosecutors, whose highly debated pensions value was not touched through the fiscal package. This strategy of the students can be a good instrument to imply that the efficiency claim of the Government is much rather just a rhetorical mask for making political choices about who should be impacted by fiscal measures.

Furthermore, an important critique for the efficiency claimed by the Government is the joint press release of the Trade Unions of teachers (ID 2). In a long, critical and firm text, the teachers' representatives are exemplifying the impact the so-called optimization measures have on the day-to-day activities of the teachers and of the schools. The press release ends with their request for the Minister of Education and Research to resign and to abolish the Law 141/2025:

> Showing cynicism and irresponsibility, the Bolojan Government is causing an unprecedented crisis in education in the last 35 years, given that these measures practically mean the reorganization of a good part of pre-university education, in a period of about a month.
>
> The serious thing is that all these measures were taken, from the pen, without making, as was natural, an impact study.
>
> The Minister of Education and Research, Mr. Daniel David, should have had the strength, to warn the Prime Minister of the Romanian Government, Mr. Ilie Bolojan, that the education system is a complex one, and its employees are not just simple inventory objects, but are human beings who cannot be discredited and humiliated, as the governors are doing now. (ID 2)

This analysis shows how the efficiency discourse can be a weapon used to present contested political decisions as objective necessities that are meant not to sacrifice certain social categories, but to come in the help of the citizens, by increasing the efficiency of the state and its funding distribution. Interpreted through the lens of CDA, the efficiency discourse reflects a classic case of technocratic depoliticization. By framing austerity as "correction" or "optimization," governmental actors translate political decisions into seemingly neutral administrative imperatives, exemplifying what Fairclough (1995) terms the "technologization of discourse." Such framing suppresses ethical and distributive concerns and privileges managerial rationality—thereby reinforcing neoliberal logics of governance described in the austerity literature (Blyth, 2015; Kelsey et al., 2019 etc.). The counter-discourses, which expose the embodied consequences of these measures for teachers and students, reintroduce precisely the

social relations and power asymmetries that the efficiency narrative seeks to erase. This struggle over what "efficiency" means reveals austerity as not merely a fiscal doctrine but a discursive project that reshapes institutional priorities and hierarchies.

D. Threats and consequences

A final discursive strategy central to the austerity debate identified in this research is the use of threats and consequences to justify the necessity of the policies implemented, which is meant to discipline both citizens and institutions into compliance. By using such strategies, the Government implies that there is no other way to avoid economic collapse and blockage if their policies are not endorsed, which can generate fear and amplify tension in society, as the main goal of this discourse is to position cuts as a lesser evil compared to a systemic breakdown.

The most significant example of this discursive strategy is the part related to the education system in the justification note of Law no. 141/2025:

> Considering the fact that in order to avoid a blockage of the education system, in the context of the impossibility of financial support by the Romanian state, in the current legal framework, immediate changes are required to ensure the right to education.
>
> Considering the fact that the budget must be resized starting from the level of 2023, before the introduction of unsustainable commitments through the new legislation. (ID 6)

By using the term *blockage*, the authorities are trying to suggest that without their austerity package, the education system will be paralyzed. This strategy creates fear throughout the relevant stakeholders and gives birth to alarmist construction that leaves absolutely no room for negotiation and dialogue on the matter, as the urgency is what matters for them. Later on, the Minister of Education and Research echoed this in his public press release:

> As a member of the Government, I had to rationally and decently correct the contribution of our sector to the country's deficit (along with other areas), in order to avoid that from autumn, in general, the country will have problems with the payment of salaries/pensions/scholarships/social aid. (ID 3)

Such rhetoric is consistent with the concept of crisis talk, visible when a state of exception is created and the need of justifying extraordinary (and often unpopular) measures arise. In the above extract, the range of threatened consequences is meant to generalize the sense of crisis and the so-called rational decisions – the education budget must be cut to save not only the system itself, but the entire nation.

However, counter-discourses are tackling this issue and are delegitimizing the measures. Unlike government discourse, the joint press release of the trade unions (ID 2), along with the protest signs made by the students (ID 8) are outlining the consequences that the fiscal reduction has on the education system – while the

government claims that austerity is the only way to avoid collapse, the resistance formed by teachers and students are portraying the austerity as being the actual reason for a potential collapse of the education system. This clash in discursive strategies portrays exactly why language of fear is a discursive battleground when it comes to crisis talk.

The threat-based discourse observed in governmental texts strongly reflects the mechanics of crisis talk described by Moffitt (2016): crises are not neutral conditions but performative constructions that foreground urgency, danger, and exceptional measures. The invocation of systemic "blockage" and imminent inability to pay salaries or scholarships exemplifies this logic of dramatization. In N. Fairclough and I. Fairclough's (2012) terms, such formulations function as instruments that narrow the space of deliberation by presenting austerity as the only reasonable course of action. Counter-discourses, however, invert this logic by framing austerity itself as the threat — a reframing that exposes the contingent nature of crisis narratives and demonstrates how legitimacy is continuously negotiated rather than settled.

Across all four discursive categories described above, the analysis demonstrates how austerity in Romanian education operates as a hegemonic formation produced through layered strategies of legitimation: rationalization, moral evaluation, authorization, and appeals to scarcity. Linking these findings to the theoretical framework reveals that austerity discourse functions simultaneously as a technology of government (in Foucault's terms) and as justificatory apparatus grounded in arguments for action (in Fairclough's views). However, the counter-discourses are trying to illustrate that hegemony is always partial and contested and this interplay between dominance and resistance underscores itself the discursive nature of governance that confirms that austerity's power lies not only in fiscal policy but in its capacity to shape ways of thinking about problems, solutions and future.

Limitations

This study inevitably has its limitations, specific to the studies that are using the CDA technique as an analysis instrument. The analysed corpus, yet diverse, covers a restricted set of statements and texts emerged from authorities, students and parents that appeared in the public space throughout the summer of 2025, so using a broader corpus, covering a longer period of time, that will allow tracing the evolution of discursive strategies beyond the immediate crisis talk and corroborate them with the actual results of the implemented financial measures can be considered for further developments. Moreover, it is a study that focuses only on textual material, because of the time constraints. Further research should take into account the impact that multimedia elements (visuals, media coverages, videos, audio notes etc.) can have a significant impact on the results and should be therefore considered. Nevertheless, exactly like in other critical discourse analysis, the interpretative dimension should be taken into account, because discourse is something that can be differently perceived from one to another, despite the efforts in

designing a transparent and objective coding scheme, grounded in theoretical foundations.

Conclusion

This study examined how austerity in Romanian education was discursively constructed, legitimized, and contested in the aftermath of the adoption of Law 141/2025. The analysis revealed that austerity discourse operated through four interconnected narrative strategies—scarcity, solidarity, efficiency, and threat—which together framed fiscal interventions as urgent, necessary, and morally appropriate, even though they had a significant impact on the education system as a whole. At the same time, counter-discourses produced by teachers, students, and unions challenged these narratives by exposing their social consequences and offering alternative understandings of responsibility and collective duty. These findings show that the struggle over austerity is fundamentally a struggle over meaning, because it concerns what policies are enacted and how they are rendered intelligible, justifiable, and inevitable in public debate.
Austerity is demonstrated to be not merely a fiscal instrument, but also a strong discursive mode of governance that shapes the boundaries of what is politically possible. Austerity discourse draws its power from its capacity to appear natural, depoliticized, and rooted in shared moral values—conditions under which legitimacy becomes difficult to contest, which was visible also in the partial uptake of governmental frames within union discourse – this is an evidence that show how hegemonic narratives cannot be avoided and, thus, they structure even oppositional vocabularies. These dynamics have important implications for understanding both Romanian education policy and austerity governance more broadly.

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No locality left behind? Structural and institutional drivers of eighth-grade achievement and early human capital development in Romania

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Abstract

This study explores the structural and institutional determinants of early human capital formation in Romania, from a territorial perspective. The paper focuses on educational performance measured at the lowest administrative and territorial unit in Romania. Data from the National Evaluation (final exam of lower secondary education) from 2022–2024 is used to analyse how local socioeconomic context, school organisation, and spatial configuration interact to shape student performance. We combine gender-disaggregated educational data with indicators of human development as well as income, education stock and further demographic characteristics. In this sense, the present analysis provides one of the first nationwide studies to investigate how local communities are converging or diverging in terms of educational outcomes.

The results highlight that educational performance is highly path-dependent, as localities with historically higher education stock and human development in the past have an advantage in comparison with rural and less developed communities. As the latter tend to fall behind, the findings confirm that territorial inequalities are indeed reinforced through institutional differentiation – schools with legal personality (administrative autonomy) achieve better results than satellite structures, even when the socioeconomic context is similar. The moderation effect of institutional autonomy on the relationship between local development and exam performance outlines that human development alone is not sufficient to deliver convergence in the absence of strong capacity and flexible governance.

Results outline that educational inequality in post-socialist Romania is more than a simple function of economic disparity, as it also works for institutional and spatial configurations. The study contributes to further European and international debate on regional convergence, decentralisation and human capital development, as it emphasises that equity in education cannot be achieved in the absence of policy and measures that address governance and autonomy of schools.

Keywords: lower secondary education, educational inequality, territorial development, institutional autonomy

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Introduction

The traditional educational advantages of former socialist countries and the former Soviet Union are slowly diminishing as inequalities not only persist but increase (Pop-Eleches, 2015). Romania is no exception in this respect, displaying persistent inequalities across communities based on long-term social, economic, and territorial divides. To understand why students in some areas consistently outperform those in others, we need to analyse not only the characteristics of individual pupils, but also the structural and institutional factors that influence learning environments. The present study aims to analyse the extent to which these determinants impact the educational performance of lower-secondary school leavers in Romanian localities at the LAU (local administrative unit) level, the lowest administrative level. This paper aims to identify possible mechanisms of convergence and/or divergence that could characterise post-socialist systems in terms of educational disparities.

Several academic works have already addressed disparities in the Romanian pre-university education system (Tufiș, 2008; Hatos, Impactul segregării și diferențierii asupra performanțelor școlare ale elevilor din clasele 10–12. O analiză multinivel, 2008; Țoc, 2016; Gheba, 2021). Despite their consistent findings, the previous studies have not systematically incorporated structural development indicators relating to the institutional configurations of schools within a single empirical framework. This article aims to address the research gap regarding whether institutional characteristics, particularly school autonomy, can moderate the relationship between local development and student performance. This study uses LAU-level quantitative evidence at a national scale to address the literature gap on educational inequality in Romania and post-socialist Europe more broadly. The study combines structural development variables with institutional, school-level characteristics to explain variation in National Evaluation (NE) - (ro: *Evaluarea Națională*)[1] results at locality level between 2022 and 2024.

The present analysis is based on Pierre Bourdieu's theory of cultural and social reproduction, which explains how families and communities pass on cultural resources, such as language, attitudes, habits and expectations, that are more in line with the dominant culture of the school (Bourdieu, 1977). Consequently, schools tend to value and reward students who already possess these forms of capital, thus perpetuating existing social hierarchies rather than challenging them. Although cultural capital helps to explain why students from more advantaged educational backgrounds often perform better, there is limited empirical evidence on this mechanism in large-scale settings (Tzanakis, 2011). Bourdieu's concept of the field provides a useful framework for analysing whether schools operate as structured environments that recognise and reward different types of capital, or fail to convert them into academic success (Nolan, 2012; Krarup & Munk, 2016; Dingel & Sage, 2023).

[1] The National Evaluation evaluates competencies in the Romanian language and mathematics, as it served as the main selection criterion for high school admission in the period under review.

Territorial contexts introduce an additional dimension of differentiation, as structural inequalities tend to accumulate over time across different areas, creating "geographies of (dis)advantage" (Waters, 2012). Communities with historically higher levels of education and stronger human capital tend to reinforce their advantages, while less developed areas struggle to translate material resources into educational outcomes. This aligns with Myrdal's (1957) theory of cumulative causation, which suggests that disparities can widen in the absence of institutional mechanisms that promote convergence.

Based on the aforementioned perspectives, the study examines whether structural development alone is sufficient to explain variation in educational performance at the local level, or whether institutional design also plays a role in modifying the relationship between local development and learning outcomes. To achieve this, NE data from 2022 to 2024 will be linked with structural indicators such as the Local Human Development Index (LHDI), education stock, demographic statistics and income at the LAU level, as well as institutional characteristics at the school level. This will provide the first national and LAU-level analysis of how low local development and institutional capacity interact to shape early human capital formation in Romania.

Theoretical framework

Educational performance is the result of the interaction between social structures, institutional arrangements and territorial contexts. To illustrate how these multi-layered mechanisms operate across Romanian LAUs, our study draws primarily on Bourdieu's theory of cultural and social reproduction, complemented by insights from institutional sociology and territorial development theory. By combining these perspectives, we aim to provide an integrated and unique framework for understanding why students with similar backgrounds achieve different outcomes depending on where they live and how schools are organised.

Cultural capital, habitus, and reproduction

Bourdieu (1973; 1977) conceptualised cultural capital as a set of linguistic competencies, cultural dispositions, behavioural codes, and forms of self-presentation that are transmitted through families and communities. These embodied forms of capital align differently with the dominant culture of schools (Edgerton & Roberts, 2014). Consequently, this affects how easily students navigate educational expectations. In this regard, cultural advantages may be rewarded through teachers' perceptions, opportunities for feedback and differential guidance (DiMaggio, 1982; Jæger & Møllegaard, 2017).

Within this theoretical framework, schools operate as fields – structured spaces governed by norms, rules, and power relations that determine which types of capital are recognised and valued. However, reproduction is probabilistic rather than deterministic, as students from educationally advantaged communities are more likely to perform

better, although their outcomes depend heavily on contextual and institutional conditions.

Institutional mediation of cultural and social inequality

Cultural capital does not automatically lead to achievement; it is mediated by the institutional environment of schools (Buchmann & Hannum, 2001). These environments differ in terms of autonomy, leadership capacity, teacher allocation and organisational routines, all of which influence their ability to support student learning (Ferrare & Apple, 2015). The relationship between cultural capital and achievement strengthens in low-performing or resource-constrained school environments (Andersen & Jæger, 2015). This suggests that institutional characteristics have an impact on the amplification or reduction of structural inequalities.

Similar to other post-socialist countries, Romania's decentralisation process has been partial and uneven (Cătană & Cătană, 2010). This has created substantial variation in institutional capacity, with some schools operating with full legal personality and managerial autonomy, while others function as satellite structures dependent on a central school. In our opinion, this institutional diversity is a decisive factor in explaining why students with similar social and economic backgrounds perform differently across regions (Stăiculescu, Enăchescu, & Dobrea, 2014; Filip, Todrican, & Clinciu, 2023).

Marks (2005) argued that cross-national variations in social-class inequalities are more closely linked to the organisation and modernisation of school systems than to overall levels of societal inequality. This reinforces the idea that institutional design plays an independent role in shaping educational outcomes. Therefore, schools tend to act as a conversational mechanism that determines whether structural advantages, such as high levels of human development, are translated into improved learning, or whether institutional constraints lead to a "translation gap" where potential remains unfulfilled.

Territorial distribution of capital and cumulative differentiation

Last but not least, the distribution of cultural and human capital is shaped by territorial dynamics. Historically higher educational attainment in certain areas leads to the accumulation of resources over time, creating persistent "geographies of (dis)advantage" (Waters, 2012). In economic terms, the concentration of human capital drives local growth and reinforces territorial disparities, as highlighted by Lucas (1988) and Moretti (2004). These cumulative processes align with Myrdal's (1957) theory of circular and cumulative causation. According to this theory, prosperous areas attract skilled labour, institutional capacity and investment, while disadvantaged localities face stagnation and demographic decline.

Romania's post-socialist transition has intensified these patterns. While urban centres such as Bucharest, Cluj-Napoca, Timişoara and Iaşi have evolved into knowledge-based economies, rural and former industrial regions have stagnated and experienced

population decline. These territorial inequalities could explain why structural factors strongly predict localised educational outcomes (Petrakos, 2008).

The present study adopts a multi-layered conceptual framework that brings together three areas of research: (1) cultural and social capital, which shapes students' dispositions, expectations and interactions with schooling; (2) institutional design, which determines whether these advantages or disadvantages are amplified or mitigated through autonomy, governance and organisational capacity; and (3) territorial development patterns, which create persistent structural inequalities that influence schools' ability to support learning and shape the distribution of opportunity across localities.

Educational context in Romania and the "No Child Left Behind" policy framework

Although Romania's educational system is organised and governed centrally by the Ministry of Education and Research, it operates through a multi-layered governance model involving local authorities and county school inspectorates. Compulsory education spans twelve grades, covering primary (ISCED 1), lower secondary (ISCED 2) and upper secondary (ISCED 3) levels[2]. Romania's schools are either legal entities with administrative and managerial autonomy, or satellite schools operating under the authority of a parent school. This dual structure is important for understanding institutional disparities, as school status determines the degree of financial and managerial autonomy available to each educational unit.

Funding remains highly centralised and is based on a per capita allocation formula ("cost per student"), which may be supplemented by local contributions. However, this formula often fails to account for structural disadvantage, geographical barriers, or the additional costs of serving small and rural schools. Local authorities administer infrastructure and maintenance budgets, while the Ministry of Education and Research controls staffing norms, the curriculum and national assessment policies. As a result, a school's capacity to deliver quality education depends on national policies and the fiscal and administrative strength of local authorities.

The pre-university education system features a highly fragmented school network with numerous small rural and satellite schools, which has a negative impact on equity, resource distribution and learning outcomes (OECD, 2024). Data show that Romania's public-school network is dominated largely by satellite, rural, and very small schools. Of the 16,507 schools in total, 64% are satellite schools enrolling only 19% of students, and 69% are in rural areas serving 34% of the student population. Furthermore, 45% of all schools are very small institutions with fewer than 50 students, attended by just 6% of learners.

[2] The national education system in Romania includes early childhood education (ISCED 0) through to primary (ISCED 1), lower secondary (ISCED 2) and upper secondary (ISCED 3) education. It also includes post-secondary, non-tertiary programs (ISCED 4), short-cycle tertiary education (ISCED 5), and higher education at the bachelor's, master's, and doctoral levels (ISCED 6–8).

Public investment in education in Romania remains well below international standards. Per-student expenditure is less than one-third of the OECD average at the primary level (USD 3,150 compared with USD 10,562) and approximately half at the secondary level (USD 6,474 compared with USD 11,597) (OECD, 2023). These low spending levels, combined with weak redistribution, continue to widen territorial disparities (Popa, 2023; Iulia & Trandafir, 2025). Although the 2023 education laws aim to increase annual public spending to 15% of total government expenditure, implementation remains incomplete (Ministry of Education, 2025).

International assessments consistently addressed the consequences of these structural and institutional disparities. For example, the PISA 2022 results revealed that approximately four out of ten Romanian 15-year-olds do not achieve the minimum proficiency level in reading, mathematics or science, categorising Romania as one of the lowest performing countries in Europe (OECD, 2023; Nausica Noveanu, 2023). Inequalities between socio-economic groups and between rural and urban areas are among the highest in the EU. For example, 84% of rural schools scored below Level 2 in mathematics, compared with 34% in urban areas (OECD, 2023). Such type of inequalities reflects up to higher education graduation (Deaconu & Roiniță, 2024).

Teacher-directed instructional practices further contribute to low performance, even when controlling for students' socioeconomic background (Borș, 2024). Additional disparities emerge from early childhood participation, with 19% of five-year-olds not enrolled in kindergarten (OECD, 2024), and from ethnic and linguistic disparities, which particularly affect Hungarian and Roma students (Hatos, 2008).

Recent reforms introduced through the 2023 "Educated Romania" legislative package seek to address these systemic weaknesses. These reforms include targeted funding for disadvantaged schools, a competency-based curriculum revision, and enhanced school leadership roles in the context of expanding remedial programmes. A key principle of these reforms is the commitment that "no student, no child, no young person will be left behind", as set out in the Ministry of Education and Research's Institutional Strategic Plan for 2024–2027 (Ministry of Education, 2024). However, the majority of these measures are still in the early stages of implementation, if they are being implemented at all, as there is a significant gap between legislative intent and operational reality. In addition, the new legal framework means that it is more important than ever to examine how structural, institutional and territorial factors shape educational performance at the local level.

Methodology

The empirical analysis relies on administrative and statistical data covering all Romanian localities (LAU level, SIRUTA classification). National evaluation microdata respecting student-level exam results at the end of lower secondary education (ISCED 2) were obtained from data.gov.ro and aggregated to the locality-year (LAU x year) level for analysis for the period 2022–2024. School-level information was extracted from the same

database provided by the Ministry of Education and Research and was assigned to LAUs based on each school's physical location (as expressed through the SIRUTA classification).

Structural indicators, on the other hand, were drawn from the Local Human Development Index (LHDI 2018) dataset, the 2011 and 2021 National Censuses administered by the National Institute of Statistics (NIS), and the Ministry of Development, Public Works and Administration (MDLAP) (Sandu, Ionescu-Heroiu, Frant, & Butacu, 2020; Sandu, 2025).

Despite the fact that the data originates from multiple observational levels (students, schools and localities), the empirical models are estimated at the locality (LAU) level because the National Evaluation results are analysed as aggregated LAU x year outcomes. However, institutional determinants remained measured at the school level, as these vary across schools within the same locality. To link school-level information to locality-level performance, each school was retained as a separate observation and assigned to its corresponding LAU. Thus, localities with multiple schools contribute multiple institutional observations to the dataset, whereas structural determinants remain uniquely measured at the LAU level.

Table 1

Operationalization of variables used to analyse structural, institutional, and territorial determinants of educational performance in Romania.

Category	*Name*	*Definition*	*Measurement*
Dependent variable	Educational performance	Assesses student achievement at the end of lower secondary education, as a proxy for local human capital formation.	Median National Evaluation (NE) scores aggregated at locality (LAU) level for each year (2022–2024).
Structural determinants	Local Human Development Index (LHDI) (2018)	Composite index of local development calculated for 2018 (Sandu, Ionescu-Heroiu, Frant, & Butacu, 2020), combining three pillars: human capital (education stock + digital access), material capital (income per inhabitant), and health capital (standardized mortality ratio).	Normalised index (0–1) combining income per inhabitant, education stock, and health indicator.
	Education stock (2011)	Long-term accumulated human capital of the locality, measured using the census distribution of the adult population by highest educational attainment, based on 2011 Census.	Share (%) of adult population by highest level of completed education.

Category	*Name*	*Definition*	*Measurement*
	Income from own sources per inhabitant (2023)	Material capital indicator reflecting the local fiscal capacity and economic resources available within a locality.	Calculated as the total revenue from own sources (local taxes, fees, property-related revenues, and other autonomous income) divided by the number of residents, based on Ministry of Development, Public Works and Administration and National Institute of Statistics.
	Life expectancy at birth (2011)	Overall health and well-being indicator of the population, for 2011.	Estimated average life expectancy at birth at locality level (2011), where available.
	Resident population (2021)	Total number of residents living in the locality (LAU), capturing demographic scale, settlement hierarchy, and degree of urbanisation. Reflects the local human resource base and developmental capacity of the territory.	Census 2021 resident population (NIS); used in log-transformed form as lnpoprezid21 to correct skewness and ensure comparability across localities.
Institutional determinants	School status	Dummy variable: 1 = legal personality; 2 = subordinate structure.	Administrative autonomy of the educational unit: 1 – school with legal personality; 2 – assigned school structure (satellite school).
	Operating mode	Dummy variable based on school timetable structure.	Organisational structure and schedule adaptation: 1 – regular schedule; 2 – adapted or shift-based schedule.
	Funding type	Dummy variable indicating predominant funding source.	Source of financial support: 1 – state budget; 2 – fees and sponsorship.
	Ownership type	Dummy variable indicating ownership/administrative model.	Governance mode: 1 – public; 2 – private.

Local administrative units (LAUs) reveal meaningful variations in terms of human capital, fiscal capacity, demographic structure, and access to educational infrastructure. Higher territorial units (NUTS2 – development regions; NUTS3 – counties) demonstrated negligible explanatory power in preliminary tests. For example, there is virtually no correlation between NUTS3 regions and national exam results (r = -.007), confirming that educational inequalities in Romania are fundamentally local phenomena.

Institutional determinants were measured at school level. Each school forms an observation linked to its LAU, meaning that: (1) structural variables remain constant within localities, (2) institutional variables vary between schools within the same locality, and (3) the dependent variable (median NE score) is shared by schools belonging to the same LAU in the same year. This structure therefore introduces an intra-locality dependence.

The present analysis will use Ordinary Least Squares (OLS) regression to estimate the association between local development indicators and educational performance at the LAU level for structural and institutional determinants. Median scores are used instead of means because many rural localities have small cohorts of fewer than 10 graduates, making means highly sensitive to outliers and resulting in skewed score distributions in small populations. Lastly, using the median ensures comparability across LAUs.

Gender and urban-rural inequalities in lower secondary education

This section addresses two key sources of variation in students' educational outcomes: gender and the urban-rural divide. While these differences are not considered spatial inequalities in an econometric sense, they nevertheless represent important contextual factors that influence educational conditions and the development of human capital in Romania. By analysing both individual-level disparities (gender) and contextual disparities (urban-rural), this section offers insights into how structural and institutional determinants operate across localities.

Between 2022 and 2024, the total number of NE remained stable – 155.561 (2022), 161.652 (2023) and 160.467 (2024). The results confirm a persistent rural-urban performance gaps across all three years. Urban schools consistently outperform rural ones in both internal (lower secondary averages) and external assessments (National Evaluation).

Internal grading showed remarkable stability, suggesting continuity in assessment practices at school level. In contrast, NE scores exhibit a declining trend, particularly in urban areas, falling from an average of 7.40 in 2022 to 7.11 in 2024. The discrepancy between internal grades and standardised exam scores is particularly evident in rural areas, widening from 2.50 to almost 2.91 points.

This divergence could be due to one of the following: (1) grade inflation, (2) unequal preparation for standardised exams, or (3) the impact of disruptions related to the pandemic. International findings suggest that disadvantaged learners were among those who experienced learning losses during and after the pandemic. (Betthäuser, Bach-Mortensen, & Engzell, 2023).

To statistically validate these differences, an independent samples t-test was conducted. Urban students significantly outperformed rural students, with mean scores of 7.28 (SD = 1.86) and 5.76 (SD = 1.86), respectively. As the Levene test indicated unequal variances ($F = 169.43$, $p < .001$), a Welch's t-test was applied, resulting in a mean

difference of 1.51. This represents one of the largest gaps in the Romanian education system, highlighting the robustness of the urban-rural divide.

Table 2

Residence environment differences in National Evaluation exam averages, 2022–2024.

Residence environment	*N*	*Mean*	*SD*	*t(df)*	*p*	*Mean diff.*	*95% CI [LL, UL]*
Rural	173,803	5.76	1.86	–269.85 (361,568.36)	< .001	–1.51	[–1.53, –1.50]
Urban	281,711	7.28	1.81				

Such magnitude highlights the structural disadvantages that are embedded in LAU contexts. Therefore, the urban-rural divide is not merely a spatial disparity, but a contextual inequality shaped by differential access to qualified teachers, school infrastructure, digital resources and transport, and entrenched in community-level socio-economic conditions.

Across all three years analysed, female students consistently outperform male students in both lower secondary education grades and National Evaluation exam averages. The gender pattern is stable and statistically meaningful, in line with findings in the broader literature on female advantage in the first stages of educational attainment (Voyer & Voyer, 2014; Buchmann, DiPrete, & McDaniel, Gender inequalities in education, 2008; Jere, Eck, & Zubairi, 2022), including in Romania (Robayo-Abril & Rude, 2023).

A t-test comparing the pooled gender results confirmed significant differences. Female students achieved a mean score of 6.95 with an SD of 1.92, while male students achieved a mean score of only 6.45 with an SD of 2.00. Although this difference is smaller than the urban-rural gap (0.49), it is statistically robust across all years analysed.

Table 3

Gender differences in National Evaluation exam averages, 2022–2024.

Gender	*N*	*Mean*	*SD*	*t(df)*	*p*	*Mean diff.*	*95% CI [LL, UL]*
Female	228,716	6.95	1.92				
Male	226,798	6.45	2.00	85.06 (454,327)	<.001	0.49	[0.48, 0.50]

To examine the effects of gender and exam on students' National Evaluation averages, a two-way ANOVA was conducted. The result consisted of a statistically significant main effect of gender. $F(1, 455{,}508) = 7268.32$, $p < .001$, with female students outperforming males across all years.

Table 4

Two-way ANOVA results for the effects of gender and exam year on National Evaluation exam averages, 2022–2024.

Source	*df*	*Mean Square*	*F*	*p*
Gender	1	27,700.19	7268.32	< .001
Exam year	2	4561.46	1196.89	< .001
Gender × Exam year	2	60.03	15.75	< .001
Error	455,508	3.81		
Total	455,514			
R^2 = .021 (Adjusted R^2 = .021)				

The interaction between gender and year was also significant, F (2, 455,508) = 15.75, p < .001, despite the small effect size. Nevertheless, it could be concluded that the gender gap remained stable across time. More important is that the model explains only approximately 2.1% of the variance in exam averages, a fact that leads us to further search other indicators.

Structural determinants

The table below shows the correlations between educational attainment at a local level and a series of structural indicators. The median national evaluation score is strongly associated with both educational attainment (r = .793) and the local human development index (r = .686). This indicates that student achievement is deeply linked to the long-term accumulation of human capital. The results reinforce the idea that educational performance is path-dependent, as communities that have historically invested in education continue to produce higher-performing student cohorts.

Table 5. Correlation between local educational performance and human development indicators, per LAU, year, 2022–2024.

Variable	*Median EN score*	*EN – Grades 5–8 diff.*	*LHDI*	*Income*	*Population*	*Education stock*	*Life expectancy*	*Environment*
Median NE	1	.940	.686	.497	.393	.793	.483	.720
Median NE − Grades 5–8 diff.	.940	1	.611	.461	.377	.715	.448	.641

Note: All coefficients are significant at p < .001 (two-tailed). N ranges: 396,136–477,448 locality-year observations due to pairwise missingness.

A key variable in Table 5 is the difference between NE scores and lower secondary school grades (between the fifth and eighth grade). This indicator was introduced to capture the misalignment between internal assessments and external examinations. The proposed conceptual value of this variable resides in assessing the reliability and validity of school-based grading as a proxy for educational competence. The very strong correlation between NE scores

and this difference (r = .940) highlights that, in areas where the gap between internal grades and NE scores is smaller, school grading practices more accurately reflect students' preparedness for national assessments.

Even more relevant is the fact that this gap tends to shrink as local development improves – better alignment between internal and external evaluations is exhibited by more developed localities. This pattern indicates a higher level of pedagogical consistency and more rigorous grading standards, which are characteristics of a robust instructional environment. In contrast, larger discrepancies in less developed areas could reflect grade inflation, weaker instructional quality, or limited exam preparation, which ultimately adds to previous layers of structural inequality.

The urban environment further amplifies these disparities. The strong correlation between residential area and median NE scores (r = .720) confirms that the urban-rural divide remains one of the most persistent educational inequalities in Romania. Schools in urban areas benefit from concentrated teacher expertise (Hanushek & Woessmann, 2010), more favourable teacher allocation patterns (Greenberg & McCall, 1974; Hanushek, 1979), and a more advantaged socio-economic composition of pupils (Perry & McConney, 2010). These factors generate cumulative advantages that reinforce higher educational performance. Income per inhabitant (r=.497) and resident population (r=.393) are correlated with educational performance but only moderately. In this sense, economic and demographic scales do exist and have an effect but are insufficient to overcome historical educational disparities within a community.

Table 6.

Multiple OLS regression with structural determinants predicting Median National Evaluation Scores at the LAU level (2022–2024).

Predictor	*B*	*SE*	*β*	*t*	*p*
(Constant)	3.002	0.010	—	302.119	< .001
LHDI (2018)	0.001	0.000	0.011	5.371	< .001
Income per inhabitant (2023)	0.000008	0.000	0.007	5.216	< .001
Resident population (2021)	4.293×10^{-7}	0.000	0.085	81.790	< .001
Education stock (2011)	0.048	0.000	0.572	218.239	< .001
Life expectancy at birth (2011)	0.005	0.000	0.029	23.937	< .001
Residence environment (urban/rural)	3.002	0.010	—	302.119	< .001

Note. R = .807; R^2 = .650; Adjusted R^2 = .650; Standard error of the estimate = 0.750. Dependent variable: Median NE score at the LAU × year level, 2022–2024. Coefficients represent OLS estimates; significance tests are based on conventional OLS standard errors.

Regression analysis shows that 65% of the variance in local educational performance can be explained by structural development factors (R^2 = .650). The results are statistically significant for all variables. The chosen model highlights the combined influence of human capital, demographics and the local environment.

Education stock emerges as the dominant driver (β = .572), providing renewed confirmation that, even from a territorial perspective, educational performance is deeply

path-dependent due to accumulated human capital. Localities with historically higher educational attainment consistently produce better student outcomes at the end of lower secondary education.

Another significant factor is the urban–rural environment (β = .193), with students from urban areas performing substantially better even when controlling for development and population. Access to higher-quality educational infrastructure and school concentration remain key drivers of systemic inequalities. In line with this finding, population size contributes modestly (β = .085), underlining that larger communities tend to provide stronger institutional infrastructures.

LHDI (β = 0.011) and income per inhabitant (β = 0.007) demonstrate small yet statistically significant effects. While economic and developmental conditions enhance educational performance, they are not determinant in relation to education stock. The very high correlation between LHDI and educational resources (r = 0.840) suggests that local human development is a reflection of, and an outcome of, accumulated educational capital. Finally, life expectancy (β = 0.029) plays a minor yet positive role, suggesting that better health and well-being contribute modestly to young people's academic outcomes.

Institutional determinants

Another layer of analysis covers the institutional model, based on organisational characteristics such as school status (whether the school has legal personality or is a satellite school), operating mode (whether the school has a regular schedule or is adapted to multiple groups of students per day), funding type (whether the school is funded by the government or through fees and sponsorship) and ownership type (whether the school is publicly or privately owned). Bivariate correlations indicate that institutional variables correlate modestly but significantly with educational performance. The strongest associations are shown by school status (r = .263) and operating mode (r = .258). As funding type is perfectly collinear with ownership type (r = 1.000), the former is automatically excluded from the model.

Table 7.

Multiple OLS regression with institutional determinants predicting Median National Evaluation Scores at the LAU level (2022–2024).

Predictor	*B*	*SE*	*β*	*t*	*p*
(Constant)	2.770	.020	—	137.691	< .001
School status	.999	.006	.233	171.610	< .001
Operating mode	.638	.004	.239	175.439	< .001
Ownership type	1.241	.016	.103	76.274	< .001

***Note**: R = .364; R^2 = .133; Adjusted R^2 = .133; Standard error of the estimate = 1.218. Dependent variable: Median NE score at the LAU × year level, 2022–2024. Coefficients represent OLS estimates; funding type was excluded from the model due to perfect collinearity with ownership type.*

The mode explains only 13.3% of the variance in local educational performance, significantly lower than the human capital model. Nevertheless, the results are still meaningful given the scale of analysis. In this sense, the results reflect that school-level governance and organisation do exert a distinct influence, which is complementary to other local structural development factors.

The school's status, either with or without a legal personality ($\beta = .239$, $p < .001$), does reflect that educational units with a larger degree of administrative and managerial autonomy consistently outperform assigned school structures. Indeed, decentralisation and institutional autonomy are correlated with higher educational performance, especially through resource management and pedagogical flexibility.

Furthermore, the operating mode effect ($\beta = .103$, $p < .001$) showed that schools with a regular daily schedule perform better than those operating multi-shift or adapted programmes. Such organisational arrangements are typically found in rural or resource-constrained settings, where schools often combine multiple year groups or share limited facilities. These results align with the disparities in equality of opportunity highlighted by Hanushek and Woessmann (2010), which emphasise that structural constraints perpetuate inequalities in achievement.

As ownership and funding are less relevant to the results, their absence reflects Romania's highly centralised financing system. As funding type is perfectly collinear with ownership type ($r = 1.000$), the model cannot estimate both simultaneously. The findings are reflected in the educational legal framework, which states that private schooling at this level was marginal in terms of both number and geographical spread.

Why schools need autonomy? Institutional moderation of educational performance

School status, as an important factor of educational performance in lower secondary education, represents a satisfactory proxy for what we can relate to as *institutional autonomy*. In this sense, we will further analyse if the effect of local human development on educational performance (median NE score per locality per year) depends on the institutional status of the school. We choose a general moderation equation that was applied throughout a UNIANOVA test in SPSS, based on the formula below.

$$Y = \mu + \alpha Z + \beta X + (\alpha\beta)(XZ) + \varepsilon$$

- Y Median score at National Evaluation per locality per year
- X LHDI2018
- Z School status (dummy coded: 0 = legal personality, 1 = assigned structure)
- α Main effect of school status (categorical factor)
- β Main effect of LHDI (covariate)
- ε Error term

Table 8.

Moderation of the local development - educational performance relationship by institutional autonomy (school status).

Source	*df.*	*F*	*p*	*Partial η²*
LHDI2018 (local development)	1	94,127	< .001	.165
School status	1	3,237	< .001	.007
LHDI × School status	1	7,926	< .001	.016
Model fit	R^2 = .491	—	—	—

Note: *Parameter estimates are:* $Intercept = 3.202$; $\beta_{LHDI} = 0.062, p < .001$; $\beta_{School\ status} = 0.929, p < .001$; $\beta_{Interaction} = -0.028, p < .001$.

The results, summarised in the table above, proved a statistically significant interaction between LHDI and school status ($F(1, 476282) = 7926.15, p < .0001, n^2 = .016$). These results clearly show that the strength of the association between local human development and student performance depends on the institutional configuration of schools.

As LHDI has a strong main effect ($F = 94126.97, \eta^2 = .165$) on educational performance, demonstrating that socioeconomic context is the baseline determinant of student performance in National Evaluation, the institutional differentiation acts as an amplifier.

School status effect ($F = 3237.38, \eta^2 = .007$) indicates that schools with legal personality outperform assigned structures, even after accounting for local development factors. In this sense, schools that have a larger managerial and financial autonomy function as an amplifier of local potential. Through these schools, human and material capital at the community level can be more efficiently converted into positive learning outcomes, as outlined by Woessmann (2005) and Bray and Varghese (Bray & Varghese, 2011), whom emphasized that an increased governance flexibility enhances educational responsiveness.

The negative coefficient of the interaction term ($\beta_{Interaction} = -0.028, p < .001$) underlines that in satellite schools, the positive influence of LHDI on educational performance at NE is significantly weaker. This is particularly remarkable, as even in more developed localities, where schools lack legal status and depend administratively on larger institutions, developmental advantages fail to translate to a higher degree into better results. This suggests a *translation gap*, which is defined as a structural inefficiency whereby territorial prosperity does not automatically generate human capital gains without adequate institutional mediation.

The above moderation analysis provides quantitative confirmation of the broader theoretical claim that institutions do indeed shape the impact of socioeconomic structures on educational outcomes. For Romania, as well as other post-socialist countries, the results are particularly revealing. As decentralisation has been partial and uneven, autonomy gaps between schools contribute to the reproduction of inequalities

in opportunities, even within the same developmental region. Institutional efficiency, derived from autonomy, is a significant new factor in educational convergence, complementing the traditional focus on economic and territorial resources.

The results outline that though local human development provides the potential for educational achievement, it is the institutional organisation (and its autonomy) that determines the realisation of that potential. In the absence of institutional capacity, development is slightly inert. As pointed out by Sen (1999), the c*apability approach* applies to organisations, such as schools, as resources have meaning, particularly if individuals and organisations exercise agency.

Discussion and Conclusions

The analysis provided a comprehensive and multi-level understanding of early human capital formation in Romania by integrating structural, institutional and territorial determinants of educational performance. By linking the *Evaluarea Națională* results (2022–2024) with socioeconomic and institutional data at the LAU level, this study enhanced the empirical understanding of how local development, school organisation, and spatial context interact to shape learning outcomes.

A key finding was that the relationship between educational stock and local education performance (β = .572) is statistically strong. The statistical strength confirms the path-dependent nature of human capital formation. In this sense, localities with historically higher educational attainment continue to produce better performing cohorts, illustrating the cumulative and self-reinforcing mechanisms described by Myrdal (1957). This *circular and cumulative causation* demonstrates once again that educational performance cannot be separated from the historical geography of human capital.

Furthermore, the Local Human Development Index (LHDI) and income per inhabitant played significant, though smaller, roles. This positive but rather modest coefficient suggests that material prosperity alone is insufficient to generate educational convergence unless it is translated through the effective social and institutional mechanisms. These findings nuance conventional human capital theory, showing that while economic resources matter, these are not decisive in contexts with strong regional and institutional disparities.

The strong effect of educational attainment and the persistence of rural-urban inequalities indeed reflect the cumulative causation mechanism described in the theoretical section. This reinforces the idea that territorial disadvantages tend to reproduce themselves over time. This challenges the assumption that economic growth automatically improves educational outcomes. It also aligns with evidence from Central and Eastern Europe showing that increases in GDP have not consistently led to parallel improvements in social or educational indicators. This finding is particularly relevant for Romania and other Central and Eastern European countries that have started

to show an increase in economic indicators while neglecting social outcomes, including those related to education.

The rural-urban divide was consistently visible across all the models used in this paper, which underlines once again that it is one of the defining features of Romania's education system. Cities, through teacher concentration, resource density and parental education, outperform rural areas and produce a persistent territorial divergence in early human capital. Therefore, spatial inequality remains a major constraint on Romania's human development.

This reinforces structural spatial inequality rather than marginal performance differences. This aligns with international evidence that the urban concentration of resources strongly predicts educational advantages, as outlined by Hanushek and Woessmann (2010).

The most significant contribution of this present study is the demonstration that institutional characteristics moderate the effect of local development on educational performance. The moderation model revealed that schools with legal personality – those that have an enhanced administrative and financial autonomy – outperform assigned structures even after controlling for local human development ($F = 3{,}237$, $p < .001$). Furthermore, the significant interaction effect ($\beta_{Interaction} = -0.028, p < .001$) showed that territorial advantages translate less effectively into performance when schools are administratively dependent.

This result is particularly novel and policy-relevant, as it highlights institutional moderation as a crucial component missing from the traditional model of educational inequalities. Previous analysis typically focuses on economic or territorial disparities. The findings support the argument that institutions act as conversion mechanisms: even in socioeconomically developed regions, educational outcomes rely on how effectively schools do managerial and pedagogical agency. In the absence of institutional capacity, local prosperity does not automatically provide better learning outcomes – a phenomenon we relate to as a translation gap.

In this respect, the findings provide empirical support for Sen's (1999) capability framework as applied to organisations: resources alone do not automatically generate outcomes, but rather, outcomes are generated when institutional actors have the autonomy and capacity to transform resources into meaningful achievements.

The results confirmed that educational performance in Romania remains a deeply territorialised process, governed by the interplay of historical, institutional and other developmental forces. Structural variables such as education stock and LHDI explained much of the variance, but institutional moderation, especially school autonomy, defines how effectively local development translates into learning outcome. Thus, institutional autonomy emerges as an independent axis shaping not only organisational outcomes, but also educational trajectories.

The moderating role of institutional autonomy confirms the theoretical expectation that schools serve as mediating structures, capable of amplifying (or weakening) the influence of local surroundings on student achievement.

In this light, early human capital formation emerges as both an outcome and a driver of local development. Having a persistent rural-urban gap as well as the limited role of county-level governance highlights the need for more context-sensitive educational policies that indeed recognise the uneven geography of institutional capacity.

At a broader scale, our findings contribute to the international debate on territorial inequality and educational governance, demonstrating that, based on an EU member state case, convergence in education requires not only material investment but also institutional capability – that kind of capacity that schools and local systems need to transform resources into equitable learning opportunities. Policies that could upscale rural schools and improve their status as transmission nodes that receive resources but are unable to convert them effectively, rather similar to urban, more frequently autonomous schools that act as human capital multipliers.

Finally, the findings suggest reframing equity-oriented education policies. While "no child left behind" remains a guiding principle, the Romanian context indicates the need for "no locality left behind". Achieving educational equity in post-socialist Central and Eastern Europe depends now not only on economic growth but also on empowering people and building institutions to act as engines of human capital convergence. Thus, the findings address the empirical gap identified in the introduction by demonstrating that structural development alone cannot fully explain educational disparities. Rather, the design of institutions plays a crucial role in shaping how territorial resources translate into learning outcomes.

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With authority and empathy: the dual voice of kindergarten teachers in homogenizing ethnic and class differences in early childhood integration in Hungary

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Abstract

The present article examines institutional discourses on preschool "integration" in Hungary through qualitative interviews with kindergarten teachers in three ethnically mixed communities. The research investigates boundary-making processes in everyday parenting practices related to the institutional context of early childhood education. In the paper, we focus on how boundaries are (re)constructed in and by the institution of the kindergarten. Our analysis draws on two theoretical frameworks to situate the empirical data: Bourdeau's concept of symbolic violence, which elucidates the hierarchical relationship between families and kindergarten professionals, and theories of street-level bureaucracy, which shed light on the dual identity of kindergarten teachers as both authoritative figures and empathetic caregivers. Findings from our research suggest that kindergartens, the first compulsory institutional settings for children in Hungary, play a key role in transmitting and enforcing community norms and thus serve as a key instrument for fostering social cohesion. However, the integration mission of teachers and institutions is framed around middle-class norms, positioning them as exclusive standards to which all children and parents need to conform. The key (unintended) consequence of this integration mission is the erasure of cultural and ethnic differences, often accompanied by racializing discourses about the Roma. This study critically examines the integration approach widely shared in early education pedagogy, revealing both its social costs and purported benefits.

Keywords: kindergarten integration, Roma, boundary-making, symbolic violence, street level bureaucracy

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1. Introduction[1]

To explore how institutions produce social boundaries and how ethnicization unfolds at the local level, we conducted field research in two Hungarian settlements in 2023–24. Drawing on the narratives of kindergarten teachers, we examined the subjective boundaries that are created and maintained within local communities, as well as the characteristics, perspectives, and processes that shape them. Through this work, we gained deeper insight into how kindergarten teachers interpret and reproduce local social dynamics. Kindergartens represent the first institutional environment with which children and their parents must interact. Since the centralization of schools in 2013, they have remained the only educational institutions maintained by local governments. This makes kindergartens a particularly suitable setting for investigating the formation and preservation of local community norms, as well as for an analysis of how internal boundaries and practices of inclusion are enacted through local institutions.

From the perspective of this article, Norbert Elias's *The Civilizing Process* (1939/1969) is particularly relevant, as it addresses the dynamics of state centralization and the consolidation of European welfare systems. More broadly, Elias's work encourages attention to the situations and interpretations through which social relations are organized and reproduced in unequal ways, as well as to the forms of symbolic (and at times physical) violence that states can exert on socially marginalized groups.

In our case, this framework helps illuminate the power relations between middle-class, non-Roma kindergarten staff and Roma parents, who constitute a local minority. Through its institutions and their agents, the state simultaneously performs a civilizing mission aimed at modernizing and "lifting" people out of poverty, while also acting as a cultural oppressor that reproduces its own dominance through the very practices intended to "uplift."

We conducted interviews in three settlements with key institutional actors, including preschool directors, teachers, early childhood educators, and a small-town mayor, in order to analyze the practices and narratives of preschool education as a "civilizing process" through the lens of pedagogical discourse. While we do not lose sight of the integrative aims and positive intentions of preschool education, we draw on the concept of institutional symbolic violence to articulate a critical perspective on preschool integration. In doing so, we seek to highlight the "price" of integration – the less visible, often problematic underside of the "civilizing process."

[1] The present article draws from a Hungarian language paper, revised and adapted to an international audience (Árendás, Kende and Messing 2025). We believe that the research deserves to be shared with the broader international audience, as its findings are relevant beyond Hungary, especially in the Central East European region.

2. The historical and institutional context of Roma children's preschool attendance in Hungary

Kindergartens in Hungary occupy a historically and culturally significant position within local communities. Their role extends beyond mere custodial care: they represent the foundational stage of formal education, guided by pedagogical principles that seek to cultivate cognitive, emotional, and social competencies within an educationally structured yet nurturing environment. Consequently, kindergartens in Hungary are embedded not only in the educational but also in the communal fabric of settlements, reflecting community values concerning childhood, learning, and socialization.

The first Hungarian kindergarten was established in 1828. The Education Act of 1949 integrated kindergartens into the state education system, and centrally directed institution-building led to steadily increasing participation rates. During the 1950s, the large-scale construction of kindergarten facilities played an important role in supporting women's employment in line with the socialist state's ideology. By the 1960s, around 40–50% and by the 1980s, 80-85% of children aged 3–6 attended kindergarten (Németh & Pukánszky, 1999). After the post-communist transition in the 1990s, responsibility for maintaining and managing kindergartens was transferred to local governments, leading to territorial inequalities in service provision (i.e., richer local governments could run better institutions). Such socioeconomic inequalities were most pronounced in small villages with a high proportion of Roma residents, where limited municipal resources often constrained kindergarten access. Thus, non-attendance was mostly characteristic of rural, poor, and Roma children. According to Havas and colleagues (1995), among the Roma children, 40% of three-year-olds and 54% of four-year-olds attended kindergarten, along with 72% of five-year-olds, which was the compulsory kindergarten attendance age at the time. In addition to the structural constraints, the lack of trust of Roma parents also contributed to the lower attendance rates of Roma children. According to Pik (2002), these institutions often failed to provide Roma children with adequate attention, tolerance, or pedagogical competence.

In the 2000s, kindergarten attendance became a focal policy area for supporting the early inclusion of disadvantaged and Roma children. The key policy initiatives to this end were the *Preschool Attendance Allowance*[2] (Havas & Liskó, 2005; Kertesi & Kézdi, 2012) and the introduction of compulsory kindergarten attendance from the age of 3 in 2015. The participation rate among 3–6-year-olds increased to 93.4% (KSH, 2021).

Data support the effectiveness of compulsory pre-schooling from the age of 3 in terms of later school success. Hungarian studies have shown (Kertesi & Kézdi, 2012;

[2] The *Óvodáztatási támogatás* (Preschool Attendance Allowance) was a conditional cash transfer program introduced in 2009 to support families and encourage preschool attendance among disadvantaged children. It was discontinued in 2015, when preschool attendance became compulsory from the age of three.

Altwicker-Hámori & Köllő, 2016) that differences in test performance by social status decrease with longer preschool attendance. The delayed positive effects of longer kindergarten participation are much stronger among children from low-status backgrounds than those from high-status families (Cserti & Csapó, 2019).

In sum, kindergartens in the Hungarian context are especially significant educational institutions for two reasons. First, they represent the earliest point of contact between families and formal education, thus embodying the state's civilizational role at the local level. Second, their socializing influence extends beyond the children they educate: through the child, kindergartens impact the broader family environment, giving them a social outreach that exceeds their formal educational mandate.

3. Theoretical Frameworks

In our paper, we focus on teachers' narratives about their classroom practices in kindergartens with Roma and non-Roma children to analyze and understand the role of educators/educational institutions in these processes. To understand the narratives of institutional actors, we combine two analytical frameworks: the conceptual approach of symbolic violence with the framework of narrative dissonance.

Pierre Bourdieu's concept of symbolic violence plays a central role in his theory of power and social reproduction, especially in the field of education. He used the concept of symbolic violence in the sense that those in power impose prevailing cultural values, norms, and meanings on those outside the power structure in a way that appears natural and legitimate, thereby reinforcing existing social hierarchies (Bourdieu & Passeron, 1977). Unlike direct physical violence, symbolic violence operates through discourse, pedagogy, and institutional practices, subtly shaping individuals' perceptions of their own abilities and social value. Translated into the context of the education system, this means that the cultural capital of dominant social group(s) is favoured, while those from disadvantaged backgrounds must adapt to this.

In Bourdieu's approach, education is the primary arena of symbolic violence, systematically reinforcing existing social structures (Bourdieu, 1986). Since the knowledge and language use valued by educational institutions reflect the culture of the dominant group(s), students without such a background are often labelled less intelligent or talented, when in fact they are simply unfamiliar with the cultural expectations of the school system or incompatible with it in terms of cultural capital (Grenfell & James, 1998). One of the most important mechanisms and characteristics of symbolic violence in education is that those involved in it misread or fail to recognize power relations. Students and teachers attribute academic success or failure to individual effort rather than interpreting it as a consequence of structural inequalities (Bourdieu & Passeron, 1977). The internalization of dominant values leads marginalized students to blame themselves for their difficulties and accept their lower social status as natural rather than a consequence of systemic exclusion. As a result, symbolic violence ensures that the

education system reproduces class differences while presenting itself as neutral and objective (Swartz, 1997).

Critics of Bourdieu often argue that this approach overemphasizes the rigidity of social reproduction and underestimates the individual's capacity for action, or agency, within the educational system (Jenkins, 1992). However, empirical studies continue to support the idea that educational institutions favor certain cultural competencies over others, thereby reinforcing social stratification (Reay, 2004). Bourdieu's concept of symbolic violence remains key to understanding how inequalities persist in suppose dly meritocratic societies and seemingly neutral education systems. Through the analysis of the education system, the concept helps to understand the hidden workings of power.

Elias's theory about the civilizing process (1939/1969) and Bourdieu's concept of symbolic violence are closely linked. The theory of civilization shows how self-discipline, etiquette, and emotional control became fundamental norms in modern European societies. The "civilizing mission" does not only involve a series of behavioral changes, but also a moral and cultural hierarchy that justifies the construction of a boundary between the "civilized" and the "barbarian" in the name of social progress. According to Elias, the internalization of social constraints occurred in parallel with the emergence of the modern state: external discipline was transformed into internal self-control, enabling the birth of the "civilized" subject. Bourdieu's concept of symbolic violence complements this process. Bourdieu pointed out that power in modern societies does not operate through overt coercion, but through the naturalization of cultural norms. Symbolic violence is enforced through habitus: individuals accept their own situation because the prevailing values and tastes seem legitimate. From this point of view, the civilizing mission itself is symbolic violence, as it justifies social and cultural hierarchies in terms of "development" or "moral superiority."

Elias and Bourdieu's thinking thus reveal two sides of the same logic of power: Elias provided a historical account of how self-discipline becomes a collective norm, while Bourdieu showed how these norms reproduce domination in everyday practices. The civilizing mission is a form of symbolic violence, a cultural power that presents discipline and morality as the natural order that sustains inequality. The "civilized" subject is thus not a product of freedom, but of internalized power.

Another conceptual and theoretical source for our study – M. Lipsky's street-level bureaucracy approach (1980) – provides a framework for interpreting teachers' narratives of everyday practices in kindergarten. Lipsky's work (1980) fundamentally questions the previous understanding of the practical functioning of public policies. Contrary to the traditional top-down model, according to which public policies are shaped by legislators and administrators and then simply implemented, Lipsky pointed out that public service workers in direct contact with people have significant discretionary power, which strongly modifies the outcomes of public policy. He recognized that "public policy is not best understood through decisions made in legislative bodies or the offices of high-ranking officials," but through the daily activities

of frontline workers who "define and limit people's lives and opportunities" (Kosar, 2011, p. 11). Lipsky's analytical framework provides an inspiring starting point for distinguishing between formal (bureaucratic) and informal (beyond bureaucracy) practices and customs in the narratives of nursery school teachers. We use the formal/informal distinction to capture how the principle of similarities and differences is realized and articulated along these two parallel "modes of operation" or narrative frameworks.

Ellmer's (2020) anthropological analysis, which highlights the contradictions of institutional (kindergarten) inclusion and the internal tensions of everyday practices, draws indirectly on Lipsky's concept of street-level bureaucracy. Ellmer's analysis, which focuses on the creation and dismantling of differences ("doing and undoing" differences), presents the bureaucratic-official and private voices of kindergarten educators (state employees). In our view, Ellmer's analysis is also applicable in the Hungarian context to the interpretation of teachers' narratives about the preschool education of Roma children, as these narratives simultaneously render ethnic boundaries invisible and redefine and reinforce them.

While Weber (2002) emphasized distance and emotional detachment in relation to the ideal bureaucrat when discussing the role of institutional actors and role identification, the ideal teacher is the opposite: connected and compassionate. Ellmer (2020) attempts to address this contradiction in his detailed ethnographic analysis, which focuses on two types of educators: the formal bureaucrat, who represents a neutral version of acceptance, and the compassionate person, who, at the same time, practices distinctions that are re-woven into informality. Austrian kindergarten ethnography (Ellmer, 2020) examines the professional ethos of impartiality as part of kindergarten inclusion. As the author points out, through the ideal of impartiality, educators feel assured of kindergarten integration in an environment where children come from a variety of backgrounds. In Ellmer's research, kindergarten teachers talked about how attaching ethnic labels and labeling families as "good" or "bad" hinders equal opportunities for integration in kindergarten. In other words, the kindergarten takes a colorblind approach to institutional inclusion, and at the level of principles, this is indeed the goal (reflected in the official communication of the teachers). In practice, the principle of neutrality is undermined by casual references and bits of information about children (e.g., informal references to mothers wearing headscarves). According to the head of the institution, inclusive childcare and the corresponding administrative and pedagogical practices exclude the possibility of making reference to cultural differences and diversity and require an impartial practice in which kindergarten staff simply see children as children, yet this is not always the case in everyday practice. While the kindergarten director refrained from using the word "culture" because, in her opinion, this jeopardizes the fundamental equality among children, she referred to differences as "individual characteristics" and spoke about culture in relative terms, acknowledging that "it still means something to children" (Ellmer, 2020, p. 45).

4. Research sites and data sources

Our paper draws on a European comparative project[3] in which we conducted qualitative research in three settlements, interviewing parents of preschool children, kindergarten teachers, kindergarten principals, and professionals working in early childhood institutions. We focus on boundary-making processes from the perspective of kindergarten teachers. The fields of our study in Hungary included three settlements: a village in Nógrád county in Northern Hungary (rural site) (settlement A), a small town in Bács-Kiskun county in mid-Hungary (urban site) (settlement B), and a town in north-east Hungary (settlement C). One important criterion for selecting the sites was that the Roma population was significant but not dominant, i.e., approximately 20-30%. This was considered important because we aimed to study processes of boundary-making, which is possible in ethnically mixed communities.

The village in Nógrád county (settlement A), situated close to the Slovakian border, is home to a population of approximately 1,500 and – in contrast to other villages in the region, which have become partly or completely ethnically and socially segregated and marginalized over the past couple of decades – its ethnic composition has remained relatively stable, with a 20-30% Roma population. This is largely due to its proximity to the regional center, and thus easy access to jobs and services, as well as to a determined local leadership that is conscious of ethno-social inequalities and the risks of processes of marginalization related to them.

Roma live typically on the outskirts of the village, but not in a segregated area. Their social status is high compared to Roma living in other settlements of the region, but low compared to non-Roma within the village. Through public employment programs and small-scale food processing production facilities operated by the municipality, the local leadership ensures that no one becomes long-term unemployed. It also operates institutions that improve the living conditions of the elderly and the poor (e.g., social catering services and the Sure Start Children's program). The nearby small town, which functions as a regional center, plays a significant role in reinforcing ethnic hierarchies through its institutions – most notably schools – that selectively accept village residents, involving systematically excluding poor and Roma families.

The village kindergarten is socially and ethnically mixed. According to the principal's estimation, approximately half of the children come from Roma families. There are two groups in the kindergarten that have been organized to promote ethnic mixing.

We interviewed the kindergarten principal (A/1), two kindergarten teachers (A/2 and A/3), and two professionals from the Sure Start Children's House[4] (A/4 and A/5), and conducted multiple hours of participant observation. Most of the teachers, parents to

[3] RAISE: Recognition and Acknowledgement of Injustice to Strengthen Equality (Horizon Europe ID: 101094684)

[4] This facility is potentially a very important supporting institution for marginalized families, offering health care and parenting advice, developmental support, and a space for young parents to relax.

small children themselves, spoke about their experiences as professionals and as parents simultaneously. Additionally, we conducted semi-structured interviews with six Roma parents. Our questions primarily focused on the local society, norms, and boundaries. We also asked who they consider to be a "good parent."

Since we were unable to gain access to the state-run primary school operated by the school district, which – in maintaining ethnically segregated education – is a key actor in constructing and reinforcing ethnic boundaries within the community, we included an additional site in Northern Hungary. At this site, we spoke to parents and a teacher at a religious kindergarten located in a town (settlement C) that – unlike state-run kindergartens – accepts children from the region's increasingly ghettoized villages. This made it a suitable case for an examination of how a kindergarten accommodates children from Roma and non-Roma families who are escaping the conditions of the segregated educational institutions of a ghettoized village. We interviewed one kindergarten teacher here (C/1).

The third field is a small town with approximately 15,000 inhabitants located in the Great Plains region of central Hungary. The town is famous for its tradition of labor-intensive agricultural production, mainly of berries, fruit, and vegetables. We selected this town because it has three kindergartens and because its Roma population is unusually diverse. In addition to the local Roma, who have lived for multiple generations in a segregated part of the town referred to as "Gypsytown", Hungarian-speaking Roma families from Romania and Ukraine have settled there over the past two decades. Hungarian-speaking Roma from Romania have settled permanently and work in local agriculture. Hungarian-speaking Roma families from Ukraine are more recent immigrants, typically working in local industrial production facilities, while some families have arrived more recently as refugees.

The three kindergartens in this town are operated under one umbrella institution, and thus decisions about children's enrolment are centralized. We conducted interviews with all three principals of the local kindergartens (B/1, B/2, B/3), as well as with six Hungarian-speaking immigrant Roma parents from Romania. According to the kindergarten teachers, the position of the local Roma population living in the part of town referred to as "Gypsy town" has significantly deteriorated over the past decade. While previously they were employed as seasonal workers in local agriculture, characterized by patron-client relationships, they are now excluded from these jobs. With the exception of a few Roma families who have stable employment, poverty and exclusion have become widespread. Accounts by kindergarten teachers indicate that the community is increasingly affected by drug abuse and the resulting rise in criminality.

In this paper, we focus on institutions and limit our analysis to the interviews with kindergarten principals and teachers. This is a genuine limitation of the study: because we analyze only the narratives of institutional actors, we do not claim to uncover the full complexity of local social realities. However, our research does offer insights into

interpretations and understandings of social cohesion and the role of kindergartens, one of the key institutional actors in local communities.

5. Findings

The following chapter presents the findings of the analysis that applies Elias' concept of the civilizing process in the context of kindergarten education. The analysis is structured along the following three topics: (1) everyday practices related to teaching and enforcing the norms of the kindergarten; (2) the paternalistic relationship to parents; (3) teachers' institutional and personal voices.

In our analysis, we apply Bourdieu's concept of institutional symbolic violence, which helps to describe the role of the kindergarten and its teachers – acting as agents of civilization – in promoting the acceptance of community norms. We also use the concept of institutional dissonance to examine the duality of institutional neutrality and ethno-social differentiation that prevails in the local societies. We show how kindergartens' civilizing role (as described by Elias, 1939) and their colourblind approach reinforce ethnic differences.

a. Civilization mission: teaching community norms

The role of kindergartens as agents of the civilization process becomes most evident in their narratives about children's (and their families') integration into broader local society. This is the area where Bourdieu's symbolic violence is most clearly observable in relation to the kindergarten's function as a civilizing agent (Ferge, 1997). The main tool of integration is the teaching and enforcing of behavioral norms that clearly mirror middle-class contexts. The expectations towards families (as we will show later) – even if unintended – construct the "other," who must be integrated into the white middle class. Class-based and ethnic identifications appear interchangeably in the narratives of kindergarten teachers about integration and inclusion, especially in discussions about who needs to be integrated: sometimes the latter speak about poor, disadvantaged families and children, and at other times they refer to cultural traits, or directly to Roma families.

It is worth examining which expectations are most frequently mentioned across all three sites and what kinds of power relations they imply. The most important norms established by the institution that we encountered in all our sites concerned punctuality, cleanliness, proper clothing, and decent behavior.

In the context of kindergarten punctuality, timely arrival in the morning and afternoon was emphasized as an expectation, even when teachers were aware of and sympathetic to the challenging circumstances of Roma mothers with multiple kids living in marginalized circumstances.

> *Let me give you an example. There were some who liked to arrive at around 9 o'clock. But we need to report the headcount to the kitchen by 8:30 am, so I close the doors. And there were some who were upset about this. (...) We are very flexible, and we have learnt during [...] many years that during winter, when there is a lot of mud and ice, and they don't come, and don't notify us about it, that this [will] only [be a day of] non-attendance, and they will be here the next day. ... well, even though, after 5 days of unnotified absence, I must report [them] to the child services, after 10 days the guardianship authorities, and I am not sure, maybe after 20 days, their family allowance will be withdrawn.* (Kindergarten teacher, site A, No. 1*)*

The quote above indicates that the kindergarten teacher is aware of the obstacles that make it difficult for Roma mothers living on the margins of the settlement in poor conditions to arrive on time in the mornings, as they are often left entirely alone with childcare and household responsibilities. (Other parts of the interview revealed that the teachers are also aware that fathers are often absent, working abroad, or in distant workplaces.) However, teachers are sympathetic to mothers only as long as institutional considerations, such as the kindergarten's internal regulations, are not violated. The shift from solidarity and empathy to projecting the authoritative voice of the institution exemplifies Bourdieu's concept of symbolic violence, explicitly expressed through the actions of the kindergarten (and its teachers): while they repeatedly say "we are flexible," in the same breath, they explain the sanctions that norm-breaking behavior leads to. Notifying the authorities has serious consequences for families: the involvement of child protection services may lead to an assessment of parental competence and, later, to financial sanctions, such as the withdrawal of family allowances. The possibility of involving authorities due to late arrival or absence is a constant threat in contemporary Hungary and a clear manifestation of institutional power over poor and Roma parents (Szőke & Geambaşu 2022). Although kindergartens try to avoid using these severe disciplinary tools, their potential use is generally sufficient to demonstrate authority and exert symbolic violence against families.

The quote above also reveals another important phenomenon: kindergarten teachers are under constant pressure to balance the regulations of the kindergarten – that is, as an institution where attendance is compulsory, and absence is sanctioned by law – and the individual life circumstances of families and the needs and barriers related to these.

This creates a dilemma for teachers: either they refrain from reporting absences and become complicit with parents who violate the rules – out of understanding and empathy for their circumstances – or they enforce the regulations as institutional actors, even at the cost of putting families who already face multiple difficulties in an increasingly vulnerable position. The decision and the burden that come with these everyday decisions fall on kindergarten teachers because the institution, as a key agent of the civilizing process, is compelled to enforce adherence to community norms and is blind to individual circumstances.

Another expectation mentioned by all actors – one that is clearly tied to middle-class norms – is that children should be "neatly dressed." Kindergarten teachers frequently complained about children's clothing, though they consistently added that there are exceptions. These exceptions reveal that such complaints about children's outfits target Roma parents. The institutional expectation of "proper" clothing thus serves as a clear example of how the disciplining mechanism of integration operates: children from Roma and poor families are expected to align with middle-class norms in this respect, too, regardless of their financial circumstances. Behind the notion of the need for a "proper outfit" also emerges the ideal of "respectable poverty," which not only implies blaming those living in poverty for their social position but also expects them to conceal it.

Narratives about outfits may sometimes deviate from the principle of institutional color blindness and explicitly ethnicize parents who violate such middle-class norms. In the following quote, the teacher explicitly names the group that represents the "other" – the Roma – because in the context of the given settlement, speaking of "Romanians" and "Ukrainians" refers to Hungarian-speaking immigrant families of Roma ethnicity.

> *The problem is that these children – you may say, well, doesn't matter whether Romanian, Gypsy, or Ukrainian – come from circumstances in which there are no rules, no hygiene, etc. But there are some exceptions; even among the Gypsies there are some who arrive tidy and clean* [to kindergarten]. (Kindergarten teacher, site B, No. 3]

Norms attached to attire play a crucial role in the narratives of kindergarten teachers everywhere: while in the urban kindergarten the teacher identifies otherness through clothing, the teacher in the rural kindergarten employs it in the opposite way to illustrate how Roma families living in their village strive to assimilate to middle-class norms and majority expectations in contrast to the Roma living in other villages of the region.

> *I must admit, when I see the little kiddos, I always say: We have decent children here. They are so pretty. And you can't find any fault in their clothing or hygiene, either. There are, of course, exceptions, but the majority are really neatly dressed. They are pretty, and the parents make an effort to send their children to kindergarten dressed properly, and they do not stand out from the group. I often say that some of our Roma children are dressed in even nicer and more expensive clothing than some of the Hungarians.* (Kindergarten teacher, site A/3)

The quotation exemplifies another important observation: the realization that some Roma parents make extraordinary efforts to provide their children with suitable clothes, even beyond their financial means. The pressure of community expectations in small settlements is so strong that Roma families go to great lengths to ensure that their children's clothing is perfect and does not become subject to criticism or exclusion.

In other narratives, however, personal hygiene and every attribute linked to it, such as smell, become metaphors for broader social stereotypes. The narratives concerning smell are not solely about hygiene but speak to broader exclusion and the everyday mechanism of racialization. Accounts about cleanliness and human smell often serve as means of ethnic boundary-making (Synnott, 1997), defining rules of inclusion and exclusion through expectations and norms related to personal hygiene.

"Just before you, there was a parent here, and, well, 'you know how clean our family is?' [referring here to the parent's account]*, but I had to walk around for ten minutes before I could air the office space and get the smell out"* (Kindergarten principal, site B/1)

It is worth noting here the norms and expectations regarding behavior and speech that clearly reflect those of the educated middle class: well-mannered communication, the avoidance of vulgar expressions, and politeness. Teachers train children in these behavioral norms, yet these expectations are primarily expressed in a paternalistic attitude.

b. ***Educating parents: institutional paternalism***

The civilizing role of the kindergarten and the related symbolic violence – in a Bourdieusian sense – applies primarily to parents but also to the entire family. The professional identity of kindergarten teachers is not limited to educating children; they also formulate pedagogical tasks for parents. Their narratives reveal that they consider the education of parents as part of their job responsibilities – especially when it comes to Roma parents with low levels of education. The following quote demonstrates this approach:

> *As educators, it is our task to stay flexible, so that we keep being able to communicate with both parents from the elite and to find [the right] tone with the occasionally very young, uneducated Roma parents. So this is part of our job, to find the* [right] *tone* [to use] *with everyone. Obviously, you have to talk to these* [young, uneducated Roma] *parents on a completely different level and in a different way, but there are some who understand things easily, and others we have to treat in a way that makes them feel that this is an institution, where they have to follow certain rules and customs – and they're not the ones who define these. It was hard to make some parents understand that we don't just come and go as we please here – [for example] skip a day if it is raining … – we keep teaching them.*" (Head kindergarten teacher, Site A/1)

This quotation elucidates that the kindergarten teacher relates to the parents from a clear position of authority, as an educator rather than as a partner. Infantilizing parents and treating them like children is characteristic of employees of institutions in Hungary,

which trait can also be observed in other areas – such as healthcare and early childhood care. This approach reinforces unequal relationships, sharply delineating the roles of the institution and those of the family. In the case of Roma parents, this dynamic further reinforces the pre-existing ethnic hierarchy, resulting in an even more pronounced and patronizing approach.

> *We [are in] daily contact with the parents, as well. It is definitely very difficult to find a way to [reach] them, that is for sure. But it is worth it. I keep saying that if we find something we can genuinely praise them for, they will go to great lengths. If I say two, three nice words to them […] after making a critical comment, they take it much better.* (Kindergarten teacher, site B/2)

In this quote, when discussing interactions with parents, the kindergarten teacher refers to the same pedagogical tools she would use with children: identifying and reinforcing positive aspects and embedding problems and criticism within them. In this way, the parent is also viewed as a subject to be 'educated,' and the teacher applies what are considered progressive elements of pedagogy – in other words, fosters cooperation not through threats but motivation. However, this does not change the fact that the parent is viewed as a partner only if they unquestioningly accept the institution's norms, rules, and conditions and never challenge them. In this role, the teacher acts as a civilizing agent (Elias, 1939; Ferge, 1999), using various methods to ensure that parents adhere to the community norms conveyed by the kindergarten, a key institution that reinforces the local community's cohesion.

We found only one exception in which a kindergarten teacher spoke about parents as partners, not as subjects of pedagogy – the teacher of the religious kindergarten at urban site C, which accepts children from outside the locality. When we asked about how she would define a good parent, she emphasized, in addition to punctuality and personal hygiene, a partnership-based relationship in relation to the kindergarten:

> *[Those w]ith whom we can maintain a relationship, they listen, they share their concerns about the child, and if there's a problem at home, they help us understand why the child might be behaving a certain way. Parents have always trusted us – we don't dig too deeply, but if they tell us something, like that their child is struggling because the grandfather passed away, then we try to be partners in that. […] we talk every morning and afternoon, we discuss everything with them. If there's a problem with the child, we let them know, and we also talk about what the parent could do to help us, because cooperation is really needed in some cases."* (Kindergarten teacher, site C/1)

Often, the civilizing mission is not restricted to poor or Roma families. The paternalism of kindergarten teachers can manifest itself independently of ethnicity or social class:

> *We work hard on this* [enforcing the rules] *and sometimes we need to call the parent or the family in and discuss the kindergarten codes of behaviour with them individually .... Unfortunately, families living in very good circumstances are no exception to this. Sometimes they act as if they had the right to interfere in the educational process.* (Kindergarten teacher, site B/3)

Institutional symbolic violence thus extends to everyone, the aim of which is to regulate deviations from institutional norms and enforce them on clients. At the same time, these rules and the practices of enforcement most acutely affect those furthest from the imagined middle class – that is, those who must bridge the greatest gap. While the institution does not adjust its code of behaviour and expectations for families with different social backgrounds, the burden of adaptation clearly falls on those furthest from majority norms. In other words, the seemingly neutral, 'universally applied' treatment places the greatest pressure on Roma and socially marginalized families, as they are the ones forced to conform the most.

c. Two types of voice: the institutional voice and the personal voice of teachers

In the following, we examine how different voices and speech patterns can be distinguished and separated in interviews with kindergarten directors and teachers that we conducted in the two settlements. Following Ellmer's (2020) findings, a sharp divergence can be observed between the two main narrative levels: (1) the voice of the institution, which is the narrative of the kindergarten's pedagogical and bureaucratic principles and remains at the level of formal, official discourse (formal – public policy level); and, (2) the voice of the institution's teacher, which is a narrative about the practical implementation of kindergarten rules and norms and reflects on the implementation of bureaucratic principles; the latter is mixed with the personal voice of the kindergarten teacher(s), which is a narrative interwoven with direct experiences and opinions. This latter dual voice is closely related to Lipsky's earlier concept of street-level bureaucracy, i.e., the distinction between official public policy goals and their practical implementation. Analysis of the interviews shows that the speakers switch between these two voices in almost all cases ("narrative switch"), indicating that institutional norms are not always clear and that their interpretation and application vary depending on the situation and the speaker's attitude.

While (1) the institutional narrative emphasizes neutrality, the universality of acceptance, and the principle of equality, (2) the individual teachers' voices better highlight the difficulties of implementation and the speakers' personal opinions. Institutions – and, through them, their leaders and educators – often remain unreflective about social differences: they expect children and parents to follow middle-class norms without incorporating the individual or even ethnic characteristics of the children into the kindergarten's daily practice. This is evident, for example, in the fact that the Roma language and Roma culture have no place in the institutional space. The personal voice

often appears in response to the tension between the above, as an attempt to resolve it. This narrative reveals that teachers are not actually "color blind": they see the differences and, in many cases, are understanding towards Roma parents and children. At the same time, however, the enforcement of majority norms does not encourage solidarity but rather emphasizes differences and reinforces boundaries.

The following quote reflects a kindergarten teacher's personal voice, while in the background, we can glimpse the institution's bureaucratic norms, the rules that govern it, and the presumed tension between these and kindergarten practices – in this case, a more permissive attitude related to a crisis situation, which also indicates that such "alternative solutions" cannot become part of the kindergarten's everyday practice, but must be treated as exceptional, unique situations. This confirms that the institution's basic norms remain solid and inflexible in everyday life.

> *We know if they have health problems. We try to help them if we know that, say, a mother is due to give birth in a few weeks and says she is having difficulty bringing her child to kindergarten. If I have a mother like this, or a mother with a high-risk pregnancy, she comes in and asks if I can help her so that she doesn't have to come in for a few weeks, at least until she has help, for example – then the kindergarten is flexible*. (Kindergarten teacher, site A*/2*)

In this context, the voice of solidarity is presumably a female one that shows empathy and understanding regarding the challenges of pregnancy and the everyday difficulties of raising children. This facilitates the sensitive handling of individual situations and support based on human relationships. At the same time, in this environment, this attitude of solidarity is not integrated into the white middle-class system of norms. Instead, it appears as a kind of exceptional, individual reaction that does not become part of the institutional functioning. The kindergarten structure continues to strive to establish and maintain majority norms, so solidarity can only be expressed through temporary gestures limited to certain situations.

In the previous sections, we have shown that, according to the self-image and task perception of institutional actors, the kindergarten is one of the key institutions involved in local integration and a priority area for learning locally relevant social norms. At the formal-bureaucratic level, the narratives of the institutions emphasize the importance of “color blindness” and education independent of social class. In contrast, in narratives about the implementation of educational principles, permeated by informality, ethnic-based distinctions regularly appear. One example of this is provided by the account of a kindergarten teacher who first argued in detail and with conviction for the importance and practice of coeducation, but later stated, in a personal tone, that it was self-evident that she would not enroll her own preschool-aged child in the local school. She justified her decision by saying that she did not consider the “composition” of the institution to be appropriate, as “the proportion of Roma children is too high.” This contradiction

highlights the fact that while formal discourse emphasizes the principles of equality and coexistence, social and ethnic distance still plays a decisive role in personal decisions and their practical implementation.

In the following excerpt from an interview with an institution manager, the formal-bureaucratic institutional voice emerges. The speaker emphasizes the system of norms and rules that govern the institution's operation. At the same time, the narrative reveals a gap between the principles the institution represents and the everyday habits and needs of its "users" – that is, parents and children. This discrepancy is evident not only in the difficulties of complying with the rules but also in the extent to which the institution's operations ignore parents' circumstances and needs.

> *It is typical of Roma people that they like to live according to their own rules. When a not-so-young mother comes here, she also has to be taught that there is a system here. I always hammer it into the girls when they come here sometimes and say they want this or that, and I always tell them, girls, we are the institution. We don't adapt to parents and families; it's their duty to adapt to us*. (Kindergarten teacher, site A/1)

The last sentence in this quote is a clear example of institutional violence: it makes clear who dictates how this power relationship operates and shows that there are no compromises, no rapprochement between the interests of parents, families, and children and the institution's will. The superiority of the rules and norms and their one-way enforcement make clear the institution's superior position vis-à-vis its "clients"

The following quote reflects the voice of institutional practice. While at the formal-bureaucratic level (1) the principle of neutrality and colourblind integration appears as the dominant narrative, at the level of practice (2) differences are readily apparent – yet only unreflectively, or, as in this case, perceived as disturbing factors that must be brushed over as quickly as possible. This discourse highlights that differences not only remain invisible in the institution's functioning, but, when they do emerge, they are treated as problems rather than accepted.

> *Roma children start out at a disadvantage. Let's start with what I mentioned, that they have low levels of education and customs, so they bring that culture from home, and that's how they end up in kindergarten, where they have to learn everything.* (Kindergarten teacher, B /2)

The institutional, formal-bureaucratic, and personal narratives that can be distinguished so far point to the fact that colourblind neutrality prevails at the level of rules and norms in local, institutional-level inclusion, but at the level of implementation, in the narratives of everyday kindergarten life, the differences between children and their families are re-ethnicized. Individual narrative voices often attempt to resolve the tension

arising from the divergence between bureaucratic elements and daily practices, while reinforcing local group boundaries and re-ethnicizing them.

A local kindergarten teacher speaks emphatically about the institutional practice of integration at the community level: "*There are three kindergartens, but they are integrated, and we pay close attention to ensuring that they are also integrated at the group level.*" In Hungary, in pedagogical jargon, "integration" most often refers to mixing Roma and non-Roma pupils in the same group, which is rarely accompanied by pedagogical methods for addressing this diversity. In general, integration (aka diversity, in the form of group composition) and integration as a pedagogical approach to some sort of inclusion remain very insufficiently reflected upon in Hungarian institutional settings.

The following kindergarten teacher regrets the lack of participation and partnership on the part of Roma parents, but when she details the reasons for the parents' absence, the institutional and private voices become mixed. Thus, in the following excerpt, a narrative switch occurs.

> *"They don't come [...] they don't participate in parent-teacher conferences and other events. So they exclude themselves.*
>
> *(Interviewer): Why?*
>
> *I don't know. Maybe it's because they don't want to be embarrassed because they can't afford to buy their children nice clothes, or maybe it's genetic because [of the thought] they'll be singled out. 'I know I have shortcomings (official ones), and I can't fix them, nor do I want to, because it's comfortable for me this way, but I don't want to face them either' [here the teacher quotes an imaginary Roma parent].* (Kindergarten teacher, site B/1)

Attendance at all-day kindergarten, especially for children from disadvantaged social backgrounds, could pave the way for greater social integration. The kindergarten teacher quoted earlier correctly recognizes this and emphasizes its importance. However, when explaining why Roma parents do not take advantage of this opportunity, she speaks in a private voice, reproducing differences, and at times, stigmatizing:

> *And that's why Gypsies often don't want full-day kindergarten, because there are conditions there too, you have to bring pajamas, and you have to undress there, and then it turns out that they're dirty, I don't know. But we know that the [mothers/parents] are attached to their children. So [a mother] doesn't let them go on field trips either, because she is attached to her child. And she is protective. Because that's what she lives for.* (Kindergarten teacher, site B/1)

The institutional (1), formal-bureaucratic (2), and personal narratives identified so far in the accounts of kindergarten directors and teachers clearly show that local institutional

acceptance is a process fraught with contradictions. Color-blind neutrality prevails at the level of rules and norms, but in practice (that is, in the narratives about everyday life in kindergarten), the differences between children and their families are re-ethnicized. While institutional discourse proclaims a policy of equality and neutrality, cultural and ethnic differences still play a decisive role in practical operations – only they are not acknowledged, reflected upon, or incorporated into kindergarten practice; instead, they are presented as problems or differences that need to be addressed. The tension arising from the discrepancy between bureaucratic rules and everyday practices is often resolved by individual voices. Such personal narratives can sometimes express emotional identification and empathy, but at other times they convey rejection and stigmatization, and as a result, do not break down local group boundaries but rather reinforce and re-ethnicize them. Thus, kindergarten integration does not become an integrative process, but rather a field in which majority norms are enforced and hierarchical differences reinforced.

5. Conclusion

In our analysis, we have examined the narratives of institutional actors, preschool teachers, and preschool directors, seeking answers to how they interpret their own roles, what boundaries they perceive in local communities in the course of their professional activities, and how they contribute to maintaining these. Naturally, our analysis is limited: we cannot provide a discussion of the entire "social reality" beyond these narratives.

We have presented the hierarchical relationship that exists between the institution (and its representatives) and parents (families). This hierarchy seems natural to both kindergarten teachers and parents and appears to be inherent to such institutional functioning. We analyzed in detail the practices of symbolic violence in the Bourdieusian sense through which the institution exercises power over families and parents via the prescription and enforcement of norms. Institutional expectations not only regulate the upbringing of children but also indirectly shape the behaviour of parents and families, thereby maintaining the invisible mechanisms of integration through discipline. At the same time, it is important to recognize that the symbolic violence that maintains institutional power is a two-sided phenomenon. Although the enforcement of norms is clearly an act of power, it also plays a key role in laying the foundations for local integration: the institution not only has an impact at the individual level of integration, but is also a means of maintaining and reproducing the local social fabric, ensuring compliance with norms and behavioral patterns that hold the community together.

The presented narratives also highlight the civilizing mission of kindergarten teachers and kindergartens, which aim to balance cultural differences and reduce ethnic differences through colourblind integration, a pedagogical approach that does not address the management of ethnically and culturally diverse groups. In the latter case, the institution does not take cultural differences into account, i.e., it integrates on a class-

by-class basis. As shown above, paradoxically, colourblind integration results in the reproduction of ethnic hierarchies and the racialization of the Roma.

While the institutional symbolic violence discussed by Bourdieu may be a legitimate tool for improving social cohesion and integrating various social strata, our findings indicate that, within the framework of the state, symbolic institutional violence aims at pacifying disadvantaged and stigmatized groups (in this case, the Roma) locally, instead of creating pathways to social mobility for them (segregated education is a prime example of this); additionally, it produces further boundaries and strengthens racialized differences.

In the interviews with kindergarten teachers, we were able to distinguish two types of discourse: formal bureaucratic narratives and practical-personal narratives, which resonate in many ways with Ellmer's (2020) claims, as presented in the theoretical introduction. In addition to identifying and distinguishing these modes of speech in the kindergarten teachers' narratives, we also considered them important because they reveal much about the symbolic exercise of power by these institutions, as well as the dismantling and reproduction of community boundaries and the processes of local (re)ethnicization and racialization. The results of the analysis make it clear that in the kindergartens we studied, the formal bureaucratic level (norms and rules) is sharply separated from practice, the promised integration through color-blindness remains incomplete, while social boundaries are reinforced and re-ethnicized. The results indicate that kindergarten teachers are largely left to their own devices in implementing integration, and the resulting methodological uncertainty is compounded by their private voices (and opinions), fueled by majority prejudices.

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Narratives of Pedagogical Journeys: Exploring the Intergenerational Transmission of Teacher Habitus

Simona ADAM•

Abstract

Anticipatory socialization for a teaching career involves shaping a social representation of the profession by adopting values, beliefs, and behaviors. Pre-service teachers have many vital experiences before entering teacher training programs, which influence their understanding of what teaching entails. Primary socialization, during which the family transmits cultural capital and habitus to the younger generation, impacts their motivation to become teachers and sometimes provides role models for this career. This study is based on grounded theory research of autobiographical essays collected over the last five years from pre-service teachers enrolled in the final year of master's level studies in various specializations, as well as in the second level of teacher training at a Romanian university. To analyze the intergenerational transmission of teacher habitus, a theoretical sampling of 43 essays was selected, comprising narratives by pre-service teachers whose family members were teachers. The qualitative analysis of the essays reveals subtle mechanisms through which the teacher-parents influenced their children and often shaped an ideal image of the teacher role. By observing their parents (or other members of the extended family) playing the role of a teacher, the pre-service teachers internalized values and beliefs that form the ground of their teacher identity.

Keywords: intergenerational transmission, habitus, pre-service teacher, anticipatory socialization, autobiographic narrative

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1. Introduction

Anticipatory socialization for the teaching profession involves the assimilation of the attitudes, behaviors, and values of the professional group to which those who wish to become teachers aspire. While many studies have focused on the professional socialization of teachers within teacher education programs or in the workplace (Zeichner & Gore, 1990; Alhja & Fresco, 2010; Amorim & Silva, 2023), the anticipatory socialization that occurs before the start of formal teacher training has often been ignored. As Richards (2015) notes, prior socialization experiences can be considered an essential component of the professional identity of future teachers.

This study aims to explore how pre-service teachers develop their teacher identity through autobiographical narratives by reflecting on their primary socialization experiences and the role that significant others, such as family members who were teachers, played in their journey to become educators. Using a qualitative research approach to analyze these socialization experiences, the study identifies the main pathways of intergenerational transmission of teacher habitus. It highlights shared values and behavioral patterns within a specific group of pre-service teachers and how their family background influenced the development of their social representation of the teaching profession.

1.1. The role of family in the anticipatory socialization for a teaching career

In sociology, socialization is defined as the broad process through which the individual acquires values, roles, and behavioural patterns necessary for integration in society (Grusec & Hastings, 2014). According to constructivist sociological theories, people are not born social beings; instead, they become members of society by internalizing the social world (Borich, 1999; Berger & Luckmann, 1999). Socialization is based on social interaction and communication, and a multitude of factors shape it, making it a unique and personal path. At the same time, the analysis of the socialization patterns can reveal similarities and common experiences shared by a particular group of people.

The family plays a key role in the process of socialization. Through primary socialization, the parents or other members of the extended family play the role of significant others. These people have a position of intermediaries between society and the child, shaping social reality according to their own position in society, their values, and their life experience. In the process of socialization, the individual assumes not only the roles and attitudes of significant others but also their world, which becomes the only existing or imaginable world for the child, being much more firmly planted in the consciousness than the world internalized later during secondary socialization (Berger & Luckmann, 1999). As the children grow, they progressively withdraw from the roles and attitudes proposed by others. At the same time, an assumption of general roles and attitudes is achieved in the individual's consciousness. Parents pass down not only a genetic endowment but also a social inheritance. Children are often seen as inheriting

their parents' social traits or living out unfulfilled ambitions. However, whether a child chooses to follow the modeled expectations or forge their own path depends on their individual qualities. Transmission is both personal and collective, and it always involves both sides. During primary socialization, the family plays a pivotal role in creating the child's first images of various social roles, including professional roles. As Musolf (1996) points out, comparing previous theories about socialization, the process through which children are socialized and develop their selves implies taking the attitude of the significant others and role-taking.

Early studies in teacher socialization showed that student teachers strongly identify themselves with the teacher role before actual field experience (Staton & Hunt, 1992). Moreover, recent studies revealed that parents who see their children as having an aptitude for teaching are much more likely to encourage them to become teachers (Christensen et al., 2022). According to these authors, other factors that predict parental encouragement for children to pursue a teaching career include support from family or other significant individuals. Jacinto and Gershenson (2021) analyzed an American cohort of teachers and found that children of teachers were seven percentage points more likely to choose a teaching career compared to children of nonteachers. From a historical approach, the intergenerational transmission of the teaching profession is stronger between mothers and daughters (Marklund, 2021).

The process of anticipatory socialization is not passive. It is an active process in which the individuals have the power to reinterpret their experiences and influences and to construct a personal perspective and set of beliefs about teaching (Richards et. al., 2024). Emphasising the importance of the individual characteristics of future teachers, McLean (1999) observed that those who participate in teacher education programs bring a wealth of personal experiences, including substantial knowledge of what the didactic process entails. The professional identity of future teachers is often shaped by early experiences in roles similar to those of a teacher, frequently modeled after their parents' professional roles. Many aspirants for a teaching career had the opportunity to practice their teaching skills by tutoring other colleagues or replacing teachers in teaching activities. Their „teaching personality" (Brizman, 1986; Surgue, 1997) has been shaped by various experiences, including informal teaching experiences such as private tuition, babysitting, volunteering, or helping younger siblings with homework (Kaynak, 2019). Richardson and Watt (2006) found that positive past experiences in teaching and learning are key motivators for choosing a teaching career. Early play experiences, family influences, and previous academic successes were also noted as important factors influencing the decision to become a teacher (Olsen, 2008).

According to Moscovici (1984), a social representation is a system of values, ideas, and practices that helps individuals orient themselves in the social world and communicate with others by providing a shared code for classifying and naming aspects of reality. The social representation of the teaching profession is shaped by the way in which the family relates to the teaching profession and how much they value it. In

particular, if there are teachers in the family, the children are exposed from an early age to everything that the teaching profession entails, gain inside knowledge of the role of a teacher, and have the opportunity to form a more realistic image of this profession (Rothland, König & Drahmann, 2015).

1.2. Cultural capital and the construction of teacher habitus

In Bourdieu's view, cultural capital, as one of the multiple forms in which capital can be found in society, has three distinct forms: it can be embodied, objectified, and institutionalised (Bourdieu, 2018). The three forms of cultural capital are reflected in the way the individuals perceive themselves and their position in the world and society. Bourdieu defined this set of dispositions that guide the individual to act or react in a certain way as habitus (Bourdieu, 2017). The power of habitus lies in the fact that it is a „grammar of life", which we learn when we are children. While it encourages individuals to pursue possibilities that seem accessible, habitus also helps them explore alternative career paths. As Reay (2004) notes, habitus can be duplicated through exposure to environments that reinforce certain dispositions or altered to either elevate or diminish a person's aspirations. The reproduction of social inequalities is correlated with the interaction of habitus with capital (resources—which can be economic, cultural, social, and symbolic) and field (social contexts) (Archer et. al., 2012).

Teacher habitus is the result of primary and secondary socialization on teacher practice. It is described as a nexus of practice (Gubbins, 2023), or the connection between various socialization experiences. According to Grenfell (1996), pedagogic habitus includes those elements of habitus that significantly impact practice in educational settings, such as the social background of pre-service teachers and their experiences as students. Therefore, pedagogic habitus consists of embodied pedagogical dispositions that influence the way in which future teachers enact their teaching practices (Fieldman, 2016).

Bourdieu (2018) emphasizes the contribution that the educational system has in the reproduction of the social structure through the hereditary transmission of cultural capital. In his view, habitus is the product of a pedagogical action carried out by the family or collectivity; therefore, it is the result of a process of socialization and education (Bourdieu, 2017). The family transmission of cultural capital is diffuse, continuous, and challenging to observe or quantify, often being neglected. In Bourdieu`s view, the family is the agent of a primary pedagogical action, fixing in the individual the social class habitus – the first schemes of perception, ways of thinking, and action. Children interiorize the way in which parents understand what is appropriate or inappropriate, desirable or undesirable, the feeling of one's place in society, and the limits of one's social position (Johnson, 2003).

The intergenerational transmission of capital in teachers` families involves both a transmission of cultural capital and of social capital. Social capital, which is developed through frequent interactions with teachers, mediated by families, strengthens future

teachers` sense of belonging, trust, and professional solidarity (Demir, 2021). Previous studies addressed the challenges faced by pre-service teachers who have a low-income family background and focused on their adaptive strategies used in the teacher training programmes (Lampert et. al., 2016; Unal & Kurt, 2018). On the other hand, the cultural capital of the members of the family is related to the embodied cultural capital of the students who choose to become teachers (Curry, 2010). Pre-service teachers with high educational attainment and embodied cultural capital demonstrate an intuitive understanding of the practices and procedures of the educational field (Park et al., 2016).

1.3. The autobiographical essay as a reflective practice in teacher education

Biographical methods, used by the first representatives of the Chicago School of Sociology, have increased in popularity during the last decades. Biographies offer a means of exploring how identity and the sense of self are constructed in a fragmented world (Tedder, 2021). Life history shapes the belief system of future teachers and forms an image of themselves as teachers (Knowles, 2013; Furlong, 2013).

Personal narratives, in written or oral form, are an essential resource in analyzing the beliefs, attitudes, and ways of structuring the identity of future teachers (O'Brien & Schillaci, 2002; Betourne & Richards, 2015; Schaefer & Clandinin, 2019). Through them, pre-service teachers can reflect on personal motivations and discover what elements define positive relationships between teachers and students (Binks et al., 2009). Pre-service teachers' autobiographical narratives, or life histories, enable us to understand how their ideal selves as teachers were constructed and examine their tacit beliefs and preconceptions (Alsup, 2006; Furlong, 2013). As Chang-Kredl and Kingsley (2014) point out, the purpose of investigating pre-service teachers' memories is to focus on understanding their psychological motivations to teach and become teachers. Therefore, future teachers can learn from reflecting on their experiences (Dominice, 2000; Chang-Kredl & Kingsley, 2014).

Previous researchers have emphasized that even in the later stages of teacher training, pre-service teachers need help to articulate their sense of identity as teachers (Thomas & Beauchamp, 2007) and often feel uncertain of their capacity to meet institutional demands (Everitt & Tefft, 2019). Reflecting on the experiences and interactions that led to choosing a teaching career can help future teachers construct a subjective interpretation of their life course (Johnson, 2007).

2. Methods

The research design for this paper is exploratory. It uses constructivist grounded theory to analyze 43 autobiographical essays written by pre-service teachers in their final year of master`s level teacher training. As part of the Sociology of Education course, students were asked to write an essay about their anticipatory socialization process related to their teaching careers before starting the teacher training program. They were encouraged to reflect on how primary and secondary socialization affected their

motivation to become teachers and to describe the key experiences that shaped them during this journey. Additionally, pre-service teachers were asked to discuss their role models and significant others who served as examples or influenced this process.

The essays analyzed in this study are part of a collection of over 200 autobiographical essays collected in the past five years and selected through theoretical sampling. The main criterion for selection was that these essays were submitted by pre-service teachers whose parents or close relatives are teachers. The secondary criterion was that the essays contained a detailed description of mechanisms of anticipatory socialization for a teaching career conducted by family members. The pre-service teachers' average age is 22 years. The distribution of essays based on students' specialization is as follows: Visual Arts – 9, Mathematics – 8, Physical Education – 7, Music – 7, Psychology – 4, History – 2, Geography – 2, Social Work – 1, Physics – 1, Theatre – 1, and Informatics – 1. Although informed consent was obtained from all essay authors, quotes from the essays are anonymized throughout this paper, using a code made up of the initials of the name and the student's specialization (e.g., „A.B., Geography").

The research design was developed based on grounded theory methodology. Grounded theory is a qualitative approach where theory is generated directly from data collected through social research (Glaser & Strauss, 2017). This design is inductive and contrasts with the positivist method in sociology, where theory is created through logical deduction from existing assumptions and is subsequently tested with empirical data. As Glaser and Strauss mention in their key work on this methodology, generating theory from data means that most concepts and hypotheses not only arise from the data but are also systematically refined in relation to it during the research process.

The first step taken was to identify the emerging categories of significant interactions that shaped the process of anticipatory socialization of pre-service teachers before their enrolment in the teacher training program. The codes and categories generated from the analysis of the essays were constantly developed through the five years of data collection. The theoretical assumptions evolved through a continuous interplay between analysis and data collection.

Constructivist grounded theory, developed by Charmaz (2006, 2017), emphasizes how data and analysis are products of symbolic interactionism. Through data coding, the data was explored and uncovered significant themes or categories. The essays were coded using broad labels. Thus, the essays were analyzed based on key concepts or themes, and the fragments corresponding to the main thematic categories were organized into separate folders. The next step was focused coding, which involved categorizing the data closer to the theory. In selective/focused coding, the researcher frequently uses the initial codes that reappear in the process of sorting and analyzing a large amount of information. The focused codes are more abstract, more general, and more "incisive" than the initial ones, thus becoming more theoretical and applicable to a greater variety of observations.

Research questions and objectives

The primary objective of this exploratory research was to analyze the intergenerational transmission of teacher habitus for pre-service teachers, as it is described in autobiographical narratives. The research questions were as follows:

1. How do pre-service teachers describe the forms of primary socialization within their families that contributed to the development of their emerging teacher habitus?

2. How do autobiographical narratives portray the professional life and role enactment of family members who were teachers?

3. What characteristics of teacher family members are highlighted in the autobiographical accounts as significant in shaping pre-service teachers' social representation of a good teacher?

3. Findings

3.1. Primary socialization: the role of Significant Others in developing the teacher habitus

The first research question explored in the autobiographical essays concerned the role of pre-service teachers` families in developing their teacher habitus. Under this theme, the analysis of the essays revealed several categories of experiences and interactions that shaped their axiological patterns and career choices. Pre-service teachers commonly describe educational family practices and acculturation experiences as part of the context surrounding their decision to become teachers. Therefore, the codes used to select the categories of experiences were initially general codes regarding: 1) family members (parents, grandparents, or other relatives); 2) words that described the action (develop, influence, play, grow up, and so on), and 3) words that described the emphasized values and behaviours.

The repeated process of data analysis and data collection over the years revealed childhood experiences that shaped the pre-service teachers` identity and also encouraged them to pursue their interests:

> *Being born into a family with a musical history on the one hand, and on the other hand with mathematicians of different generations, I was able to develop in an environment in which both my creativity, sensitivity, and perception were stimulated, as well as the inclination towards rigor, seriousness, and analytical spirit (S. B. Musics)*

The essays describe ways of living and experiences that broaden a person's understanding of their social and natural surroundings. As the next student writes, their grandparents' roles as teachers were crucial in shaping the child`s interest in school life and in revealing talents and values aligned with the teaching profession:

> *My grandparents played a significant role in this stage of my life. My grandmother was a teacher, and my grandfather was a priest and professor. The fact that we spent most of our time together greatly influenced me. Additionally, their influence made the transition to school smooth, fueled by curiosity and creative energy.*

Although naturally introverted, my favorite childhood game was gathering my toys in my room, giving them notebooks, and teaching them. I would then correct their homework, which I also wrote, as a way to exercise imagination and self-awareness. My family supported me throughout. My grandparents were key figures in the cultural capital I acquired within my family. Through their example, I built my own identity; through their approach to society, I discovered my own resources. My grandfather encouraged me to improvise and be present, while my grandmother taught me to be discreet and in control. Later, my mother's influence became prominent, as she was the female role model I looked up to during my early years. Through her, I found the motivation to create, to explore, and to contribute. (A.G., Visual Arts)

The autobiographical narratives describe the presence of teaching materials in the home where pre-service teachers grew up, or the memory of iconic objects related to a teacher's life, such as lesson plans, textbooks, or the red pencil:

The bookcases I played in front of were populated with textbooks, exercise books, and lesson plans. (T.M., Visual Arts).

I grew up among students' graded papers and the famous red pencil. (I. O., Visual Arts)

Pre-service students with family members who are teachers often received strong support and encouragement for learning:

Since I was little, I was encouraged to learn and practice extra, and I appreciated that. I was privileged in this respect because I had access to additional help from my uncle and aunt, both math teachers. (B. L., Math)

On the other hand, pre-service teachers trained to teach physical education emphasize the stereotypical features associated with this field, confirming the connection between occupational stereotypes and the self-perception of pre-service teachers as analyzed in previous studies (Spittle et al., 2012; Richards & Gaudreault, 2016).

As most of my family members are teaching physical education, I grew up in a sporty, disciplined, and authoritative environment. (S.A., Physical Education)

Pre-service teachers bring a set of predispositions and traits to teacher education programs that make them suitable for the teaching profession. The ones who developed a greater interest in pursuing a teaching career frequently played teaching pretend games as children, instructing peers, younger siblings, or dolls. This type of role-play helped them practice some key skills of a teacher, like empathy, organization, clear communication, and taking on a leadership role. Students from all faculties mentioned that teacher role play was a favorite game during their childhood:

Since childhood, I began to show an attraction towards a teaching career, being encouraged by my family, because a simple play with dolls turns into a math lesson in which I taught what my teacher taught me, I gave marks to the dolls, and my parents bought me a small board and helped me transform my corner of play into a small classroom. (A.G. Mathematics)

Teacher role-play was a valuable opportunity for students to internalize the behavior of their parent-teacher and replicate it:

What was my favorite game in middle school? To play school, of course. I liked to imitate my teachers and pretend to teach lessons to imaginary pupils. (L.P. Musics)

3.2. The observation of the teacher's role enactment in the family

Since childhood, many pre-service teachers have had the opportunity to get accustomed to the teaching role and to learn the practices of a teaching profession, observing their parents playing the role of a teacher. Under the broad category of role enactment behaviours, the codes that were developed over the analysis of the autobiographical essays were related to professional practices, such as teaching. Many pre-service students recall attending classes taught by their parents, which gave them the opportunity to observe them in the role of a teacher:

When I was little, because I finished classes early and my parents had no one to leave me home with, they decided to take me to their classes, so I ended up attending many courses taught by my parents. (S. L., Physics)

All students who are trained to become teachers come to the teacher training programs with hundreds of hours of observation of people performing this profession. Lortie (1975) called the influence of the internalization of teaching models during the time spent as pupils in close contact with teachers „apprenticeship of observation". Under this theme, the autobiographical narratives reveal both positive and negative experiences related to the life of a teacher. In the case of pre-service teachers who had teachers as family members, this process of observing the teacher`s work was part of their family life:

I come from a family of teachers, so I spent my entire childhood crafting various teaching materials for my parents' students that were essential in their classes. Most of the time, I was disappointed with the activities in my class compared to what my mother and aunt were teaching their students. I did not want to choose a teaching career because I witnessed the stress, fatigue, and the tremendous amount of work my family put in to have outstanding students. When I chose history as my passion and decided that this was what I wanted to pursue, I had other plans. Nevertheless, I ended up becoming a substitute teacher for one year, and it was the most beautiful experience of my life. (M.P., History).

Empathy and willingness to provide support are fundamental aspects of teachers` professional roles. Pre-service teachers appear to recognize the significance of these qualities for a teacher, as their autobiographical narratives reinforced their sense of presence among their families:

I grew up in a family environment where empathy, patience, and a desire to help were valued. (G. L., Theatre).

Therefore, having the opportunity to observe their family members enacting the teacher role, the pre-service students internalised the desirable behaviours of this profession and acknowledged their importance for their future career. Being a

teacher also means mastering didactic communication. The frequent observation of the didactic process led to a better understanding of the didactic strategies and of the process of student–teacher communication:

By witnessing the interactions between students and teachers, I was able to understand didactic communication and learn empathetic skills. (M. M., Visual Arts)

3.3. Family members as teachers – Role models in the family

The family (both nuclear and extended) has a decisive role in building the social representation of the teacher role. The autobiographical narratives show that many of those who opt for a teaching career had role models in their family that they followed throughout their childhood and adolescence, from whom they assimilated values, principles, and behavior models specific to the role of teacher, and to which aspirants for a teaching career refer when they define themselves professionally. Under the category of role models, the first type of selected codes was related to the family members who were mentioned as professional models. Some codes describe the central node of the social representation of a good teacher, meaning the most stable, consensual, and enduring elements of the representation (Abric, 1993), such as dedication and passion for teaching. Other codes were used to identify aspects of the peripheral system of the teaching profession's social representation.

The qualitative analysis of the autobiographical essays of pre-service teachers confirms the conclusion of Jacinto and Gersherson's quantitative study (2021), showing that mothers are the most influential figures:

> *I think that the primary model that influenced me to pursue a teaching career was my mother, because she was a teacher. Ever since kindergarten, I have spent quite a lot of time with her, observing her teaching. She encouraged me and continues to do so, and she has guided me towards this career. (E. A., Physical Education)*
>
> *In my case, I can say that the teaching profession is inherited, because my mother is a teacher, a sensitive and devoted person to the profession. (D. B., Math)*

Role models, with their transformative power, play a pivotal role in shaping anticipatory socialization and the construction of the social representation of a profession. The authors who have studied role models have also identified how they impact the individual: they can be a) behavioral models, b) representations of the possible, and c) sources of inspiration (Morgenroth et al., 2015). As behavioral models, role models can be explained through social learning theory, which states that new skills and behaviors are learned by observing or reproducing those relevant behaviors observed in role models (Bandura, 1969):

> *My mother is teaching at the University of Medicine. I have always seen her working with passion and preparing for her lectures. I have attended my mother's lectures since I was little, and she is a role model for me, with her quiet and calm, but at the same time very explicit way of teaching her students. (C. A., Psychology)*

The role models in pre-service teachers` families taught them to choose the profession that is in agreement with their aspirations and inspired them to follow their professional path. The dedication, professionalism, and passion are mentioned by all the subjects, being incorporated in the central core of the social representation of this profession (Abric, 1996).

My grandmother, a Romanian language teacher, inspired my passion for learning, and especially for teaching others. Her dedication and professionalism made me want to follow in her footsteps. My mother was an educator, and one of the most important things I learned from her was to choose my profession in such a way that, when I arrive at work, I feel like I belong there. My mother's passion for her profession and her involvement made my path to choosing my future profession easier. (S. A., Social Work).

The vital role the teacher plays in the life of a child was also often highlighted by the autobiographical narratives:

My parents, both teachers, instilled in me the importance of education and respect for teachers, which led me to consider teaching a particularly valuable and respected career. (R, G., Physical Education)

For pre-service teachers, the social representation of the teaching profession includes not only positive features but also negative aspects of being a teacher. Among the elements in the peripheral system of the social representation of a teacher, autobiographical narratives mention the workload associated with this profession. Their own children have noticed teachers' exhaustion from a young age.

I grew up in a family of teachers: my father, mother, and grandmother were all teachers. I remember that, ever since I was little, I would see my parents coming home from school exhausted, even if they did not admit it. (S.A., Physical Education)

Despite being aware of the tremendous work of a teacher, the aspirants for a teaching profession learned that this is a gratifying career:

From my parents, I learned that the teaching profession requires much work, but also that a dedicated teacher has many rewards. (G. A., Maths)

4. Discussion

The family passes on to the next generation social values, aspirations, views on life, attitudes, and behavioral patterns. According to Bertaux and Thompson (2005), transmitting cultural and moral values is a long-term process, extending throughout childhood and schooling, and its effects are often still visible many years later. The autobiographical essays of pre-service teachers with teachers in their family reveal that their anticipatory socialization was fuelled by significant interactions and experiences that are incorporated into their teacher habitus. Their narratives show similar social and cultural values and attitudes, despite the different academic backgrounds of pre-service teachers. These findings align with the results of other studies, including Butt et al.'s

(2010) study, which emphasized the high professional status and acceptability of teaching within the families and communities of teacher candidates.

Habitus, as a framework of dispositions that guide children`s future decisions, is connected to the family environment. It acts as a „micro-climate" (Aschbacher et. al., 2010) in which future teachers begin to develop a perception of what it means to be a teacher. Previous studies on the relationship between family habitus and academic aspirations have shown that family encouragement of learning and fostering science in the family's daily life are among the most important predictors of a child's future educational goals (Archer et al., 2012). Pre-service teachers share common socialization patterns, characterized by observing their family members in the teacher role and by active involvement in work related to the teaching profession.

Early studies in teacher socialization revealed that pre-service teachers strongly identify with the teacher role even before gaining actual field experience (Staton & Hunt, 1992). The analyzed essays offer detailed descriptions of how the teacher's role was performed during childhood. Female pre-service teachers often engaged in teacher pretend games, mimicking not only their teachers but also their parents in this role. Although pretend play alone does not determine career choices, it can influence a child's social, cognitive, and professional identity. The numerous examples in the autobiographical essays show many similarities in the early childhood experiences of pre-service teachers, as many participated in babysitting, tutoring, volunteering, or other informal educational activities that provided opportunities to practice the skills needed for teaching. These shared experiences contributed to the development of similar identity traits and a collective understanding of the teacher's role.

For pre-service teachers whose parents were teachers, the many hours spent observing their parents as educators form a latent culture that significantly influences their perceptions of the teaching role and their performance in that role (Lortie, 1975; Zeichner & Gore, 1989; Borg, 2004). These meaningful interactions shape the social representation of a teacher's career. Pre-service teachers learn the most essential qualities of a good teacher and how society perceives teachers. They also understand the challenges of this profession and become aware of the hard work and exhaustion often experienced only by those who live with teachers—having the chance to grow up close to a teacher-parent enriched their image of a teacher with a multitude of shades.

As previous research has shown (Jennings & Greenberg, 2009; Butler, 2012; Aldrup et al., 2022), empathy is linked to high-quality teacher-student interactions and emotional support for students. The result of empathetic teacher behavior is effective classroom management and positive student growth. Many pre-service teachers highlighted empathy as a key trait of a good teacher, demonstrating their awareness of the importance of the emotional support that teachers provide to students.

Role models establish norms, attitudes, and values, inspiring future teachers to act in certain ways or take on specific roles. Previous research has shown that teachers' passion for teaching is a strong driver and has a motivating effect on students (Day, 2009; Serin,

2017). All family members who positively influenced pre-service teachers demonstrated a passion for their profession. Their enthusiasm was observed and internalized by future teachers since their childhood. As role models, all family members mentioned in the autobiographical essays who shared a passion for teaching offered future teachers numerous opportunities to observe and praise this behaviour. Family members, therefore, became not only behavioural models but also primary sources of inspiration for the future teaching career.

While this qualitative approach focused on pre-service teachers' subjective interpretations of their prior socialization toward a teaching career, future quantitative research will provide a more objective perspective. Since this research is based on autobiographical narratives and, therefore, on participants' memories, we should be aware that memory always constructs the past through social and cultural frameworks (Halbwachs, 2024). Narratives are often shaped by the "biographical illusion" (Bourdieu, 1986), which tends to present the past in a more positive light than the present. Another limitation of this study is that the sample consisted of pre-service teachers enrolled in the Sociology of Education course; thus, some academic specializations were underrepresented. Last but not least, the researcher also taught the Sociology of Education course. The roles of teacher-educator and researcher overlapped over the past five years, which could have influenced how the participants described their socialization process.

5. Conclusions

The teaching profession plays a crucial role in education, as teachers are often the most influential figures during critical stages of personal development. The quality of teachers, their levels of motivation, perceptions of a teaching career, and the values that guide them significantly impact the educational process and student-teacher interactions. Like many other countries, Romania faces a severe shortage of teachers, along with inadequate training and motivation for those entering the profession (Kitchen et al., 2017; OECD, 2020). In a society grappling with anomie and increasing polarization, teachers often feel confused about the expectations placed on them and about their professional identity.

In this context, exploring the role of prior socialization experiences that guide Romanian students toward a teaching career gave the chance to discover the teacher habitus that shapes their identity as educators. Although for those who are responsible for training future teachers, all these previous experiences are seen as incomplete, distorted, or representing myths or cultural representations of teaching, for students preparing to become teachers, this is the foundation from which they begin assimilating new knowledge. The pre-service teachers` primary socialization in relation to significant others who were teachers taught them not only about the duties and routines of a teacher's life but also how to interact with students, inspiring them to love a particular subject or aspire to become teachers themselves. This influence may be subtle, but it is strong and pervasive, manifesting itself later in a teaching career.

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In Defense of Schooling: readings of the crisis of schooling in late socialist sociology of education in Romania

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Abstract

The paper explores the question of how the crisis of schooling as theorized by P.H. Coombs and more radically Paulo Freire and Ivan Illich, was read by sociologists of education and futurologists in late socialist Romania by placing these in the context of debates around schooling that cut across the Iron Curtain. By inserting the debates surrounding the crisis of schooling in state socialist Romania, a country with targeted educational innovation policies directed at engaging with and overcoming the crisis of schooling, the present paper sheds light on a less known side of understanding the crisis of schooling, namely by taking a perspective from within state socialism. The crisis of schooling emerged around 1968 as youth movements were changing the face of education around the world and predicated initially a disconnect between the means of preparing youth for the future and the aspirations of people around the world, as well as the increased knowledge demands of developing socio-economic contexts. However, around this time a second strand of critical intellectual production seeking to radically break with schooling emerged: a tradition that became famous under the headline of Ivan Illich's concept of 'deschooling' but was also an important driving force in Paulo Freire's critique of 'banking education'. In line with Marxist criticism of deschooling from both capitalist and socialist countries, sociologists of education in Romania vehemently defended schooling on the grounds that its inadequacies were perfectible and its social function primordial. However, they also saw in schooling the promise to transform relationships between knowledge production (in terms of research), production processes and education through integrating these three dimensions in schools. As such the article brings context to how the world crisis of education was engaged transformatively during late socialism and thus helps rebalance epistemologically the legacy of unilateral accounts of the crisis of schooling brought about by the end of the Cold War. Finally, the paper shows how the 'first global crisis of education' was turned into a 'tame' policy issue and how this laid the groundwork for the post-Cold-War tradition of educational governing through crises.

Keywords: deschooling, dialogic pedagogy, state socialism, right to education

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1. Introduction

The right to education is often associated with the right and obligation of children up to a certain age and grade level to attend school. Despite different national political systems, the experience of schooling is relatively homogenous across contexts for similar groups, while the outcomes of schooling are very different for people who belong to different marginalized groups or class positions. While attending school is normalized today as a practice, the early 1970s saw the emergence of a veritable crisis of schooling that was addressed differently in socialist and capitalist countries. In this paper, I engage with how schooling was first problematized opening up the possibility to critically reflect on inequalities in terms of socio-material and discursive inequalities in the process of knowledge production and circulation in schools. However, this 'wicked issue' soon became 'tamed' into an actionable improvable situation thus laying the groundwork for future ready-made educational policy solutions (on the distinction between 'wicked' and 'tamed' issues in educational governance, see Landri 2025), thus laying the groundwork for a depoliticization and normalization of the question of mass schooling and a rendering invisible of inequalities fundamentally underlying the process of schooling that had without being 'solved', been brought to light through the debate surrounding the crisis of schooling. Echoes of this debate still strongly resonate within current discussions surrounding credentialism, inequality, and the limits of schooling as a response to broader social crises.

In concrete terms, I will explore how the question of the existence of a crisis of schooling was discussed in one state socialist Eastern European country, namely Romania from the early 1970s to the late 1980s. In this, I will outline the specific conditions of the postwar crisis of schooling as identified by P.H. Coombs in the 'World Crisis of Education' (1968), Ivan Illich in 'Deschooling Society' (Illich, 1970) and Paulo Freire's 'Pedagogy of the Oppressed' (Freire, [1968] 2005) and how they were taken up by international debates across the Iron Curtain. In a next step, I trace how these debates entered the sociology of education and futurology in Romania both directly through fragments being translated as part of an anthology of the sociology of education edited by Fred Mahler (1977), as well as indirectly through being referenced in key works of educational futurology and sociology of education as well as social pedagogy. By building on these, I outline the answers from within the Romanian system by building on the works of Emil Păun (1982; 1985), Mircea Herivan (1976) and Fred Mahler (1977; 1981; 1983) to questions that were engaged with by critical educational theorists such as Herbert Gintis (1973), Maxine Greene (1973) and Arthur V. Petrovsky (1976).

I show how a fundamental critique of schooling routed mostly in Latin American experiences was articulated by Freire and Illich in a context marked by the growing

recognition of a world educational crisis as theorized by Coombs and how this travelled into sociology of education debates in Romania only to be rejected. Whereas Freire focused on pedagogical aspects, Illich focused on a fundamental critique of the alienating powers of schooling and how schooling connected with and enabled the reproduction of consumerist societies in both socialist and capitalist countries. When being taken up in the Romanian context, this fundamental critique of schooling as both practice (Freire) and system (Illich) is seen as reproductive of inequalities in a problematic way that can only be countered by a socialist state enabling equal access to education and to a lesser extent equalized social status beyond school, as well as work into schools to transform how knowledge is taken up and practiced and how schools are connected to other social institutions. As such the fundamentality of the critique is displaced and a functionalist approach to schooling and its tacit reproduction and expansion is perpetuated, while school is partly re-imagined as an institution that can both (albeit to a recognized limited extent) transform social inequalities and socially homogenize the population while also to a lesser extent cultivating the transformative potential of youth. Schooling is thus rather uncritically defended as the main route to realizing the right to education within state socialism and problematic knowledge practices and status inequality are presented as unavoidable and even disconnected side-effects of an otherwise meaningful process and system of schooling.

2. Methodology

The proposed paper is built on a broader project that set out to map Romanian and transnational educational debates in late socialist sociology of education and educational futurology. The project started with library and digital archival research (mostly) in Romanian and English, and to a lesser extent German and French language sources. First the libraries of major universities and academic institutions in Romania were searched (University of Bucharest Library, Babeş Bolyai University Cluj, West University of Timişoara, Library Romanian Academy of Sciences Bucharest etc). Unavailable editions were also searched through websites of antiquarian bookstores and then purchased. At the same time, an initial archival research was conducted in the digitized archives available through the virtual sociological library (https://bibliotecadesociologie.ro), a digitization project that affords access to contemporary as well as historic sociological literature in Romania, as well as through the Arcanum newspaper archive (https://adt.arcanum.com/ro/discover/) and the UNESCO Unesdoc digital library (https://unesdoc.unesco.org/ark:/48223/pf0000075799). Initial research uncovered several relevant authors (Pavel Apostol, Mircea Herivan, Mircea Malița, Fred Mahler, Emil Păun, Lazăr Vlăsceanu, George Văideanu, Ursula Șchiopu etc) that were then followed through their research careers and publications from that time, as well as several edited volumes and relevant journals. In a next step, the debates were mapped out in relation to the conceptualization of educational futures, educational policies and innovation, the

crisis of education, the purpose of education, the construction of youth and the political, labor related, but also everyday life oriented importance of education and the relationship between education and techno-social innovations (mass media, television, film, cybernetics, school laboratories and innovations). The footnotes and bibliographies of these works were studied to reconstruct the debates, and these were followed up enlarging the basis for analysis and extending the initial analysis transnationally to follow the original texts of the debates referenced in these works. Although this approach does not aim to be exhaustive, given the timeframe (late socialist Romania), it allows for an authentic engagement with what bibliographic references were discussed and debated and which were ignored, allowing me to formulate comprehensive arguments from an intellectual historical and genealogical point of view. Keeping this in mind, the present paper is an exploration of the theme of the crisis of education in late state socialist Romania by following the question: *How was the global crisis of schooling debate of the 1970s, particularly the critiques of schooling articulated by Freire and Illich, received, translated, and reconfigured within Romanian state socialist sociology of education? And secondarily, What does this reveal about the ideological limits of critique and the functionalist defense of schooling under state socialism?*

3. UNESCO and the world educational crisis in the 1960s and '70s

In June 1968, Philipp H. Coombs (1968: v-vi) the director of the UNESCO International Institute for Educational Planning by building on the work of the 'International Conference on the World Crisis in Education' described the conjuncture in the following terms:

> *Our use of the word 'crisis' to describe education's state of affairs may also evoke initial dissent, even by some who accept the general thrust of the analysis presented here. This was the case with European educational leaders who reviewed an earlier draft of this book in late 1967. They readily agreed that other nations, especially the developing ones, no doubt faced a crisis, but not their nation—it simply faced educational 'problems.' The violent events since then in leading universities of Czechvoslovakia, France, the Federal Republic of Germany, Italy, Poland, Spain, the United States, and Yugoslavia have put the matter abruptly into sharper focus. Having examined the facts of the situation at large, we are more inclined than ever to call it by its right name—and 'crisis' seems entirely fitting.*

Coombs (1968) called for the need to open up educational debate beyond the tight confines of 'pedagogy' into fields such as engineering or sociology and described the student protests on both sides of the Iron Curtain, as well as the non-aligned movement as ('violent') events that bore witness to the resurgence of a world crisis of education that needed to be addressed by means of educational 'planning' that should operate on a systemic level. From todays' perspective, it is obvious that Coombs (1968) was applying a Western (and I can add Global North) perspective on educational planning that still survives in much of todays' educational thinking through the idea of competitiveness

between countries and the need to avoid 'lagging behind' and conversely the need to 'catch up', which in turn legitimized both a global educational research agenda, as well as a governance agenda lead by the OECD, UNESCO and the World Bank (Hemetsberger 2025: 48). However, despite its later influence, what did Coombs mean by the world-wide educational crisis he sought to describe?

Coombs (1968: 4) saw the world crisis of education emerging at the intersection of four processes that were in his view and even if not equally present in all societies in the 1960s, namely:

1. A sharp increase in popular *aspirations for education*

2. The constraining of educational systems by an *acute scarcity of resources*

3. The *inherent inertia of educational systems* that meant that educational systems would adapt with great difficulty to transformations and challenges outside of its system

4. The *inertia of societies* that blocked 'the use' societies could make of trained individuals

For Coombs (1968), these processes meant that the divide between education and society was ever-growing and that it needed to be addressed on both sides through better planning. Written in the heyday of educational planning, this report embodied the 'educationalization' of society, whose promises of a better, more equal future, we now know, have never been attained (Elfert & Ydesen, 2023:3). This went hand in hand with UNESCO's quest for finding a way forward teleologically towards a world culture and shared consciousness under the guise of 'scientific humanism', as promoted by its first director, Julian Huxley (Robertson, 2023). It is important to note that this vision had also been imbued with racist undertones in the form of civilizing imperialist discourses that encouraged an English/British 'civilising mission' (Sluga, 2010). Coombs' (1968) report also embodies a moment in which the new global order of (an almost fully) schooled society emerged (Baker, 2014) that had parted ways at least on the surface with this tradition, as well as a turning point in looking at educational developments as perpetual systemic crises that was carried through to and beyond the Covid-19 pandemic (Ahmed, 2023). The response offered by the UNESCO to the world educational crisis was the Faure report (Faure et al 1972). Published five years after Coombs' (1968) diagnosis, the report started with a teleological vision of learning as part of 'being' and in connection to the world of education of the present and the future. In short, by the 1970s this vision had kept its teleology in the form of promissory governance that drew its legitimacy from the promise of international organizations working for a better future for all humanity (Auld & Elfert, 2024). Moreover, the humanistic and democratic vision promoted by the Faure report, is still seen as a legitimate aspirational horizon for democratic education today, despite never having been realized (Biesta, 2022) and despite having been replaced and repositioned by subsequent moves in UNESCO promissory governance practices (Elfert 2015; 2017).

4. The radical critique of schooling: Freire's take on 'banking education' and Illich's call to 'deschool society'

When writing the *Pedagogy of the Oppressed* (Freire, [1968] 2005), Paulo Freire was in exile after a period in which he had been engaging in adult literacy campaigns in Brazil. His writings bring together exemplarily the Cold War politics that inscribed Latin American leftist understanding of literacy campaigns as both humanizing educational projects and processes of political mobilization (Kirkendall, 2010: 3). In this context, Freire launches his critique of 'banking education' as purely narrative education: the world is translated into sterile sound sequences rather than connected with the transformative capacity of individuals and collectivities. Moreover, banking education is an anti-dialogical process by which sterile knowledge is deposited by 'knowing' teachers into the minds of 'unknowing' students (Freire, [1968] 2005: Chapter 2). As an alternative to banking education, Freire proposes a dialogic liberatory practice in which the oppressed would be engaging in naming the world and through collective action-reflection also in transforming the world to fight injustice and liberate both themselves and the oppressors by overcoming oppression and creating a world in which 'it will be easier to love' (Freire, [1968] 2005: 40).

In Freire's thinking 'the oppressed', illiterate adult people who were economically exploited, had both a position of epistemological privilege and one of epistemological deficit. They were privileged through being the class that could liberate all humanity but were inscribed as having a deficit through the need to be rendered conscious of their historic task of liberation and their possibilities of action-reflection in the world through education (on deficit in Freire's thinking see also Azeri, 2020: 343). Freire's work on 'generative themes' (Freire, [1968] 2005: chapter 3) connected everyday experience with learning and transformative capacities of people that was translated into dialogic learning and transformation through Carolin Wang's and Mary Ann Burris' (1997) photovoice method, as well as Augusto Boal's 'Theatre of the Oppressed' (Boal, 2000). However, even in these subsequent iterations, the method continues to responsibilize 'the oppressed' for transforming their circumstances, while starting from the assumption that they need to first be transformed through educational dialogic action. Finally, from the perspective of this paper, it is important to underline the fact that Freire's critique of education in the Pedagogy of the Oppressed ([1968]2005) was a critique of practices rather than structures, education could become liberatory if it would start with the understanding that oppressed people brought into the educational process (and the educational process was understood mostly as basic literacy). At the time of writing, the Pedagogy of the Oppressed had not yet been fully translated into Romanian, a fragment from chapter 2 (on banking education) was included in the sociology of education anthology by Fred Mahler (1977; Freire 1977).

Roughly around the same time and emerging also from the Latin American context, a collaborator and friend of Paulo Freire, Ivan Illich criticized more radically not only the practices but also the social structures that he saw as rooted in the mass expansion of

schooling in *Deschooling Society* (Illich, [1970]2004). For Illich schooling, together with packaging were two main features of industrial society that needed to be overcome for the radically humanistic ideal of conviviality to take shape in everyday life (Illich, [1973] 2009: 3). For Illich, the critique of schooling is inseparable from the critique of industrial modernity, so he sees industrial tools and the general acceptance of schooling as necessity (and obligation) as leading ultimately to: "physical pollution, social polarization and psychological impotence" (Illich [1970] 2004: chapter 1: 1/15). For Illich, schooling is bound up inextricably with consumerism, it is its "reproductive organ". Schooling in a consumerist society is quintessential as it both provides the need for its own growth and reproduction, as well as initiates students into the hidden curriculum of growth-oriented consumer societies, characteristic that he considers state socialism and capitalist economies shared (Illich [1970] 2004: Chapter 6: 2/23):

> *Everywhere the hidden curriculum of schooling initiates the citizen to the myth that bureaucracies guided by scientific knowledge are efficient and benevolent. Everywhere this same curriculum instils in the pupil the myth that increased production will provide a better life. And everywhere it develops the habit of self-defeating consumption of services and alienating production, the tolerance for institutional dependence, and the recognition of institutional rankings. The hidden curriculum of school does all this in spite of contrary efforts undertaken by teachers and no matter what ideology prevails. In other words, schools are fundamentally alike in all countries, be they fascist, democratic or socialist, big or small, rich or poor. This identity of the school system forces us to recognize the profound world-wide identity of myth, mode of production, and method of social control, despite the great variety of mythologies in which the myth finds expression.*

For Illich (Illich [1970] 2004: 7/15): one of the main points of criticism of the schooled society was that learning is substituted by certification and instruction. Thus, a person becomes eligible for social roles based on number of years attending schooling, rather than his skills or learned abilities. For Illich, this ultimately results in inequalities that are reproduced through the curriculum. People who under-consume education (at that time wide segments of the world population) were made to feel guilty about this as they feel that they legitimately do not merit different social roles, regretting not having spent more time in schooling, schooling thus becomes a sanctioned and routinized social ritual (Illich [1970] 2004: Chapter 3: 8/13). His solution to early school leaving is indicative of his approach: if societies would stop making school mandatory, they would also stop punishing those who cannot access school. The alternative to schooling, so Illich would be that of 'learning webs' (Illich [1970] 2004: chapter 6) organized in an educational system that would be both non-compulsory and "truly universal". For Illich ([1970] 2004: chapter 6, 4/23), this could be realized by removing the myths surrounding education and especially the role of teachers and relying on: 'things, models, peers, and elders' as the four essential resources to make learning available to everyone. These should be organized in networks that would be readily available to the public and design to offer and spread equal opportunities to everyone. In terms of organization, the

de-bureaucratized system of learning webs would consist of (Illich ([1970] 2004: chapter 6, 5-6/23):

1. A Reference Service to Educational Objects (things)
2. Skill Exchanges (models)
3. Peer Matching (peers)
4. Reference Services to Educators at Large (elders)

This modality of thinking about learning without building a system that is ritualistic and hierarchical, as well as that radically opposes ideas of both explicit and hidden curriculum would allow, so Illich, people to learn openly from each other and to stop committing their time to education for vast periods of their lives. Learning would thus no longer be isolated from experience and could happen in places such as commuter trains or restaurants. Education could then be promoted alongside other services by department store managers, publishers and restaurant owners among others (Illich [1970] 2004: chapter 1: 13/15).

The Romanian translation of a short excerpt (Illich, 1977) included in Mahler's (1977) anthology, set out roughly Illich's critique of school as an institution and outlined the proposal for learning webs and was made via the 1971 French edition (Illich, 1971). The work was not fully translated into Romanian until 2018 (Illich, 2018), when it appeared in the collection Heteropedagogies (*Heteropedagogii)* at Idea publishing house. However, Illich's ideas were also available via the translation of Hubert Hannoun's book (1973) "*Ivan Illich ou l'École sans société",* which appeared in 1977 (Hannoun, 1977). Hannoun's book can be read today as one that defended schooling in light of the debate that ensued around the mid 1970s surrounding schooling (Zaldivar 2011: 621). The reception of Illich's arguments across the Iron Curtain in the 1970s was polarizing with reviewers engaging either explicitly against or in defence of schooling (Zaldivar 2011). Maybe the most illustrative examples of reviews can be found in the (later) edited volume by Alan Gartner, Colin Greer and Frank Riessman (1973). The collection (Gartner et al 1973) brought together essays in response to Ivan Illich's ideas. In the opening essay titled *"After Deschooling*, Illich (1973) goes a bit further from *Deschooling Society*, in making his critique of schooling more explicit. The other chapters are responses to his theses. Most of the chapters had been published as articles in the journal Social Policy with an essay by Herbert Gintis published in the Harvard Educational Review. In his opening essay, Illich (1973: 1-3) outlines clearly his understanding of the crisis of schooling as one based on the rejection of the legitimacy of compulsory education and educational certification as it leads both to turning learning into a commodity and limiting the autonomy of the learner in a context in which schools aim to reproduce the established order, irrespective of whether the order is called 'revolutionary, conservative or evolutionary'.

Herbert Gintis (1973: 38) outlines an economic Marxist critique of Illich from within capitalist societies, in it he, however, emphasizes the relevance of both Illich's thinking and his critique to the state socialist context in the following terms:

> *Throughout this paper, I restrict my analysis to capitalist as opposed to other economic systems of advanced industrial societies (e.g., state-socialism of the Soviet Union type). As Illich suggests, the outcomes are much the same, but the mechanisms are in fact quite different. The private-administrative economic power of a capitalist elite is mirrored by the public-administrative political power of a bureaucratic elite in state-socialist countries, and both are used to reproduce a similar complex of social relations of production and a structurally equivalent system of class relations.*

In his analysis, Gintis (1973) puts forth the idea that what Illich describes as manipulation through educational institutions is in fact individual adaption within the context of social options available within capitalist societies, a feature which industrialized bureaucratic state socialist economies also share. In this, Gintis (1973: 40-42) sees a way forward not in operating on a discursive level (countering manipulation and rejection of institutionalized consumerist values) but in a different form of participatory democratic engagement in institutions within society. In Gintis' view (1973), this involves reorganizing productive processes more democratically starting from communities. He views this as compatible with a technologized society but in which technology operates differently. In this context, Illich's ([1970] 2004) centring on consumption as a core institutionalized value is countered by Gintis (1973) centring on production as the organizing principle that renders consumption one of the few modalities for individual identity expression. This criticism is doubled by that of Maxine Greene (1973) that sees Illich's ideas as mainly addressing the discursive and alienating dynamics of schooling without proposing a solution that would disempower the violent and racist power structures that keep schools from transforming. Her alternative is also to think about how teachers and schools act differently and how this can lead to transformations of power relations within wider society. For Greene (1973), ironically teachers are most interested in Illich's idea of deschooling because they feel that this form of 'pop educationalise' makes them feel as if the system would indeed be resting on their shoulders.

Taken together these two points of criticism elaborate precisely on the question of the relationship between schooling as a discourse that is reproduced in which consciousness is evaded and could be regained through deschooling and the socio-material and institutional arrangements that make schools what they are – which cannot be immediately transformed through working primarily on questions of consciousness. In this context, it becomes apparent that both Freire and Illich center oppression only to prescribe as a solution the raising of consciousness of those who are being oppressed, while leaving the socio-material conditions of this oppression initially intact.

Soviet Union based psychologist, Arthur V. Petrovsky, one of the coauthors of the UNESCO Faure report (Faure et al 1972), brought a criticism of Illich anchored in the

Soviet Union's experience with the expansion of public education through schooling that very much brought home the same two main points while also exposing the implicit views on youth that were carried into the discussion (Petrovsky, 1976). On the one hand, Petrovsky (1976) noted that without a transformation (akin to that in the Soviet Union) of the fundamental social and economic conditions of existence, people could not be moulded into harmonious and aware personalities that could defend their own right to education in line with the state socialist humanist ideal of the multifaceted personality development. On the other hand, Petrovsky (1976) saw in the critique of schooling an unsubstantiated glorification of youth that was also mirrored by a de-responsabilization of teachers (and adults of their generation) towards their (young) students. As such, the consumerist logic of 'the customer is always right' was provocatively reinscribed as 'youth is always right' (Petrovsky, 1976:60). Basically, for Petrovsky (1976) schooling is the only way to establish the preconditions for systematic thinking necessary for autonomous personalities in a way that would enable young people to fight against the barriers they face in accessing knowledge, vocation or employment.

5. Debates within the Romanian sociology of education and futurology

Petrovsky's (1976) point about the absolutization of the perspective of youth in the deschooling movement is an interesting starting point in exploring how this debate reached the Romanian sociology of education and futurology. On the one hand, youth studies were becoming a growing field of both social scientific and policy importance in Romania in the wake of the events of 1968 (Mărginean, 2019). In this context, ideas circulated relatively freely, across transnational and transideological boundaries during the 1970s (Mărginean, 2019) as part of a broader transnational circulation of expertise in the social sciences and beyond (Hîncu, 2018; Iacob et al; 2018). These were also in the context of Romania's youth policies that were becoming increasingly recognized and visible (see Mărginean, 2013), building on officially recognized youth cultures that could be contrasted to actually existing ones (Copilaș, 2019), as well as futurological research in relation to education (Apostol, 1977; Cătănuș, 2015). Ideas originating in this period, such as that of juventization of society came to influence discourses surrounding youth beyond the end of the Cold War (Wallace & Kovatcheva, 1998).

Writing at the intersection of futurology and education, Mircea Herivan (1976) explores intellectually the question of the crisis of education. At this point, he is already building on his previous extensive interviews with global persons in the field of education ranging from Bogdan Suchdolwski to Margaret Thatcher (1973). For Herivan (1976), in *Education in the Future Tense* (educație la timpul viitor), he addresses the move to localize education conducted in the Illichian tradition and building on the work of Holt. In his reading, localizing education as deeply embedded learning in neighbourhoods, factories and other places where people engage in meaningful activity, is problematic not as a

practice but in and through the engagement structures suggested by the proponents of deschooling. For them, in Herivan's (1976: 39) rendition, students should receive small amounts of time 'donated' by those engaged in activity in such places. The idea of 'donating' time invokes for Herivan (1976: 39) a hierarchical and problematic relationship in which education seizes to be a right and is solely based on the willingness of those who hold both knowledge and economic power to share (or not) their practical expertise. Therefore, for Herivan (1976: 39), this type of education is reminiscent of "education by stealth" conducted in the dire experience of being an apprentice to an owner. Moreover, mass schooling is preferable to deschooling because it offers fundamental education to a vast number of children and because it is 'perfectible' – it can be improved that offers the possibility for systematic intellectual development (Herivan, 1976: 43), echoing Petrovsky's take on the problems of deschooling.

In this same vein, Emil Păun (1982: 42), sociologist of education and socio-pedagogist, saw merit in the crisis of schooling thesis as defined by Coombs (1968). In Păun's reading (1982), the essential aspect of the world crisis of education is a temporal one, namely the problematization of a temporal disconnect between the demands of social developments and the development of schooling. While acknowledging the merits and existence of this disconnect, he strongly rejected the thesis of deschooling as 'destructive critique' practices by Illich, Freire and Reimer among others (Păun 1982: 43). For Păun (1982: 45), destructive criticism is embedded in the idea that 'the future of school is its demise'. Namely, he saw in the rejection of school and the proposal to eradicate schooling, especially in the context of developing countries that had not yet enjoyed the benefits of successful mass schooling, an attempt to deprive them of this opportunity as it has come within reach. In this light, they would be deprived of this essential stepping stone to development by overly expanding a form of criticism that shows the inadequacies of schooling in capitalist countries and most specifically, the USA. (Păun, 1982:45).

At this time, the educational system was expanding through schools and had an explicitly social mandate, for example Păun (1985:6) explained in his book *Socialism and the Right to Education* that the need for education emerges "as the expression of a range of requirements that society addresses at a given moment to the educational system regarding the number of individuals and the quality of their professional qualifications", while the demand for education emerges from the educational aspirations of individuals – pointing to two diverging paths. Education is imbued with both the psycho-individual dimension, as well as the social one and they meet in the need for more 'elevated social status'. However, Păun (1985:9) is also critical of the 'deification' of the school as a context that alone could bring about social equity and social prosperity. For Păun (1985), this disconnect between the inflated expectations of schooling, and the reality of

everyday schooling is where the 'pessimism' of the deschooling movement originates. For Păun (1985) generalizing Illich's idea of deschooling to the contexts of 'developing; countries is a masked way of demanding they not share in the positive socio-economic developments brought about by schooling. Moreover, the crisis of schooling manifests itself so visibly now due to the increased need and demand for education around the world. For Păun (1985), the self-referencing character of education, its' disconnect from the world of labor and its focus on preparing people for the next educational levels are problems that need to be solved. Moreover, these tendencies become more acute as economic crises put pressure on educational systems to use resources efficiently. In socialist countries, so Păun (1985) these disconnects are less widespread, as there is a constant policy effort to minimize them. Furthermore, in his view, the school is often tasked with solving and blamed for aggravating crises that lie outside of the educational system (like economic stagnation, unemployment, social inequity etc.). These in turn justify cost cuts that than disconnect those most marginalized from the possibility to participate socially later on. From this, his conclusion follows that the only way forward is through a constant qualitative improvement of schooling and better connection to knowledge production and production (as outlined in the Romanian educational policies of that time), as well as a socio-economic and political transformations outside of school without which changes to schooling would end up being pointless. For Păun (1982: 45) the crisis of schooling can only be comprehended in light of how school 'confirms and transcribes' inequalities from within society. That is why it cannot be viewed outside of these inequalities – the crisis of schooling needs to be read across the political and social system (Păun, 1982: 45). That is why , in his view, state socialist countries are in a better position for the development of schooling and its connection to social processes: by being able to connect directly schooling with production and research.

This point of the triple connection between schooling, production and research as the vehicle for overcoming the temporal disconnect inherent in the crisis of schooling, was widespread in the sociology of education in Romania at the time and came to be embedded in educational policies in the 1970s and early 1980s (see also Vlăsceanu 1979). Fred Mahler (1977; 1981; 1983) brings to the fore a synthesis of all these questions by engaging with the relationship youth and the older generations, as well as schooling and society, in an argument that ties both schooling to the transformation of ascribed professional status, as well as democratization to flexible pathways into academic and non-academic fields and democratic socialist participation in the workplace. For Mahler (1981) this was a particularly political question tied both to democratic socialism, participatory modes of engagement and school transformation of knowledge practices – however these took were articulated in relation to the ongoing educational reform to integrate education, production and research (Mahler, 1083). The

space does not allow to elaborate on these ideas further, but it is important to note the potential for reinscribing the relationship between schooling and society, as well as the creative-innovative and the reproductive character of schooling from within schooling that was prevalent at the time. Within Romanian sociologist of education circles, one point was clear school was imperfect, but worth defending from both a functionalist as well as a transformative perspective. This points in an interesting manner to both the critical engagement with the crisis of schooling, as well as a policy and systemic solution to the problems it posed – however, from a different perspective it can also be read as the onset of a moment in which what Jim Ferguson (1994) later called the 'anti-politics machine' – an approach to development though which political issues are constantly transformed into technical issue.

6. Concluding Discussion

The crisis of schooling as a world-wide phenomenon found its expression around the questions of whether there is a relationship between social transformation, social equity and schooling and whether this relationship is a discursive one concerning consciousness or a socio-material one concerning the means of production and reproduction of society. Interestingly, operating within a state socialist educational system and with a Marxist humanist vocabulary, Romanian sociologists of education and futurologists put forward relatively functionalistic accounts of schooling as meeting both (and primarily) socio-economic demands, as well as (somewhat secondarily) personal and collective aspirations for educational upward mobility. They resonated with Marxists critiques of Illich, such as that of Herbert Gintis, in that they saw the analysis of schooling one that needed to take more of the societal superstructure into account. However, they also defended schooling beyond this point and in and as an end in itself – limiting acceptable criticisms of schooling to its imperfections and thus foreclosing the potential to investigate structurally problematic modes of organizing learning and instruction processes. As such, they saw in schooling a transformative potential that they thought should not be overestimated in terms of how (fast) it can correct social inequities, but should also not be underestimated in terms of how it can be reconnected to social and economic developments, as well as rendered innovative in the quest for developing fully human capacities in the school aged population and beyond. In this, the crisis of schooling was resolved on a theoretical and policy level through being turned into a (rather complex) tame issue to be governed in mostly non-ideological terms. In this respect, it confirmed Illich's and Gintis' interpretations of the commonalities between state socialist and capitalist states understandings of schooling and laid the groundwork for the depoliticized educational governance practices through which subsequent crisis in and of education were governed.

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General Section

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Kominkan as a Model for Non-Formal Education and Community-Based Sustainable Development in Japan

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Abstract

This paper examines the historical evolution and contemporary significance of Japan's Kominkan (community learning centers) as vital institutions for community-based sustainable development (CBSD). Emerging from the ashes of World War II, Kominkan were conceived as engines for democratic reconstruction and social cohesion. Utilizing a historical analysis framework and drawing upon Japanese educational policy documents, scholarly literature, and UNESCO reports, this paper traces the transformation of Kominkan functions from post-war recovery through rapid economic growth to the era of lifelong learning and Education for Sustainable Development (ESD). This paper argues that Kominkan's inherent flexibility, community-rootedness, and focus on mutual learning position them uniquely as platforms for CBSD. The analysis highlights key shifts: from initial poverty alleviation and cultural revival to addressing urbanization's social fragmentation, adapting to lifelong learning paradigms, and increasingly incorporating ESD and Disaster Risk Reduction (DRR) post-2011. Despite challenges in human resource capacity, particularly the reliance on part-time staff, Kominkan demonstrate remarkable resilience in fostering social capital, empowering local agency, and mobilizing communities towards sustainable futures. The paper concludes that Kominkan offer a globally relevant model for leveraging non-formal education infrastructure for sustainable community resilience and development.

Keywords: Kominkan, Community Learning Centers, Community-Based Sustainable Development (CBSD), Education for Sustainable Development (ESD), Non-formal Education in Japan

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1. Introduction: Kominkan as hubs of Community and Sustainability

The Education systems globally are increasingly recognizing the critical role of non-formal and community-based learning in fostering sustainable societies (Abdellatif, 2020; Wals, 2012; UNESCO, 2015). Within Japan's tripartite education system, which comprises formal schooling, home education, and social education (*shakaikyoiku*), Kominkan stand out as the most historically significant facilities dedicated to lifelong learning and community empowerment (Sasai, 2013; NIER, 2018). Established in the immediate aftermath of World War II, Kominkan were envisioned not merely as venues for classes, but as foundational institutions for: rebuilding a shattered nation from the grassroots up; fostering democratic citizenship; and enhancing the cultural and practical capacities of all community members (Inoue, 2015; Iwasa, 2010).

This paper argues that the history and evolving functions of Kominkan represent a profound case study in community-based sustainable development (CBSD). CBSD emphasizes local agency, participatory decision-making, leveraging indigenous knowledge, and building resilient social structures to address environmental, economic, and social challenges (Maser, 1997; Rist et al., 2007). By providing a structured analysis of Kominkan's historical trajectory, from post-war reconstruction through economic transformation and into the contemporary era of sustainability challenges, this paper elucidates how these community learning centers have adapted to serve as dynamic platforms for CBSD.

The core argument is that Kominkan's foundational principles of mutual learning, community ownership, responsiveness to local needs, and function as social nexuses inherently align with CBSD objectives. Their evolution demonstrates a capacity to pivot towards emerging societal priorities, most notably in recent decades embracing Education for Sustainable Development (ESD) and Disaster Risk Reduction (DRR) as core activities (JNCU, 2015; Makino, 2018). Drawing primarily on Japanese scholarship, policy documents, and UNESCO reports, this paper synthesizes existing knowledge on Kominkan, reframing it explicitly through the lens of sustainable community development.

While Kominkan has a unique system, it shares philosophical foundations with other global institutions for non-formal and community-based education. These include the Korean lifelong learning centers (Park, 2010), Nordic 'folk high schools' that focus on democratic citizenship (Maliszewski, 2002), the European residential folk high schools inspired by the Nordic folk high school model in Poland, Hungary, Estonia, Latvia and Lithuania (Kulich, 2002), and the expanding community-hub role of North American public libraries (Varheim, 2014). However, the Kominkan's explicit, legally mandated role as a municipal facility for social education, and its deep integration into local administration and, more recently, ESD and DRR, present a unique case. This paper addresses a gap by moving beyond a simple description to reframe the Kominkan as an adaptable, transferable model for CBSD. It addresses the following questions:

1. How did the original conception and functions of Kominkan align with principles of community-based recovery and development?
2. How did Kominkan adapt their functions in response to major socio-economic shifts (e.g., urbanization, rapid growth, the lifelong learning turn)?
3. In what ways have Kominkan explicitly incorporated sustainable development goals, particularly ESD and DRR, into their contemporary mission?
4. What are the implications of Kominkan's human resource structure (staffing models) for their capacity to drive CBSD?

2.Conceptual Framework: Social Education, Lifelong Learning, and Community-Based Sustainable Development

Understanding Kominkan necessitates grounding in Japan's unique framework of social education (*shakaikyoiku*). Legally defined in the Social Education Law (Article 2) as "organized educational activities, including physical education and recreational activities, conducted mainly for youth and adults, excluding educational activities conducted as part of school curricula" (Murata & Yamaguchi, 2010, p. 15), social education encompasses the vast landscape of non-formal and informal learning outside the formal school system (Kawano, Matsuda & Xiao, 2016). Kominkan are explicitly designated as core facilities for delivering social education (Social Education Law, Article 20).

The philosophy underpinning Kominkan resonates strongly with theories of lifelong learning, which advocate for learning opportunities across the lifespan and in diverse settings (Jarvis, 2007). Kominkan operationalize this by providing accessible learning spaces for all generations, fostering intergenerational dialogue and community problem-solving (UIL, 2017). This function became increasingly codified as Japan formally embraced lifelong learning policies in the 1980s and 1990s, leading to the reorganization of the Ministry of Education's Social Education Bureau into the Lifelong Learning Bureau in 1988 (Maruyama, 2011; Yamamoto, 2003).

CBSD represents a paradigm that grounds the principles of sustainable development within the local context, championing a bottom-up approach that prioritizes local knowledge, participation, and ownership. It emerged as a critical response to top-down development models that often failed to address the specific needs and socio-ecological contexts of local populations (Chambers, 1997). The core principle of CBSD is the empowerment of community members to become the primary actors in their own development, thereby fostering self-reliance and ensuring that initiatives are both culturally appropriate and environmentally comprehensive (Murphy, 2012). This model integrates the three pillars of sustainability, environmental integrity, social equity, and economic viability, at the community level, arguing that lasting solutions can only be achieved when local stakeholders have direct control over resources and decision-making processes (Berkes, 2007; Agrawal & Gibson, 1999; Ostrom, 1990). By doing so, CBSD not only aims to improve livelihoods and preserve ecosystems but also to

strengthen social capital and enhance community resilience in the face of external pressures and change (Berkes & Ross, 2013).

Kominkan foster local agency through participatory learning activities, build social capital by acting as community hubs, integrate diverse aspects of community life (culture, health, economy, environment), leverage local knowledge in program design, and enhance resilience through collective learning and action, making them natural institutional vehicles for CBSD (Berkes & Ross, 2013; Hisai & Abdellatif, 2021). Their historical evolution reflects the dynamic interplay between national policy, local needs, and the global sustainability agenda.

3.Methodology

This study utilizes a qualitative, historical-descriptive documentary analysis to examine the evolution and contemporary function of Japan's Kominkan. The methodology involved a multi-stage process to ensure transparency and credibility.

3.1Source Selection

A systematic selection of sources was conducted, focusing on three primary categories: (1) Foundational policy documents and laws, such as the Social Education Law and key Ministry of Education notifications (e.g., the 1946 Vice-Minister's notification); (2) Seminal and contemporary scholarly literature on the history and function of social education and Kominkan (e.g., Yamamoto, 2003; Inoue, 2015) ; and (3) Gray literature and reports from national and international bodies, including UNESCO and the Japanese National Commission for UNESCO (JNCU), which situate Kominkan within global discourses on ESD and lifelong learning.

3.2Analytical Framework

The "historical analysis framework" was applied through a dual process. First, a chronological analysis was used to trace the evolution of Kominkan functions, mapping them against Japan's major socio-economic shifts (e.g., post-war recovery, rapid urbanization, and the lifelong learning pivot). Second, a thematic analysis was applied to identify how Kominkan functions and principles (e.g., mutual learning, community-networking) inherently align with the core tenets of CBSD (e.g., local agency, social capital, resilience). To ensure credibility, findings were validated through triangulation. This involved cross-referencing and corroborating the stated policy goals (from policy documents), scholarly interpretations of their impact (from academic literature), and practical reports on their implementation (from UNESCO and municipal reports).

4.Historical Evolution: Kominkan as Adaptive Engines for Community Development

4,1Foundational Years (1946-1959): Rebuilding from Ruin

The start of Kominkan is inextricably linked to Japan's post-war destruction. The Vice-Minister for Education's 1946 notification, 'On the Establishment and Management of Kominkans,' articulated the urgent need to "cultivate the habit of thinking independently and acting peacefully and cooperatively" among citizens (Inoue, 2015, p. 20). Kominkan were mandated as institutions to achieve this democratic ideal at the local level (town and village). Their establishment was rapid, spurred by the Social Education Law (1949), government subsidies for construction, and an initial certification system for social education personnel (Iwasa, 2010; Yamamoto, 2003).

During this period, Kominkan functions were inherently developmental and community-focused:

- Comprehensive Service Function: Responding to immediate needs of "production recovery, lifestyle improvement, and the promotion of town and village autonomy" (Yamamoto, 2003, p. 78). Activities included practical skills training (e.g., improving agricultural yields, hygiene practices, home economics for women), literacy programs, and cultural activities to revive local spirit.
- Mutual Learning and Solidarity: Emphasizing voluntary discussions among residents to solve shared community problems, fostering a sense of solidarity crucial for rebuilding fragmented communities (Inoue, 2015).
- Accessibility: Even amidst scarcity, the proliferation of 'signboard kominkan' or 'open-air kominkan' using existing buildings like schools demonstrated a commitment to accessibility, ensuring a presence in almost all municipalities. Hence, by April 1958, 86% of the total number of 3,701 municipalities (3,261 cities, towns, and villages) had established kominkan. There were 34,650 kominkans, including both main and branch kominkans (Yamamoto, 2003).

The National Kominkan Liaison Council (founded 1951) and national conferences facilitated knowledge sharing and standardization. This era established Kominkan as indispensable, community-owned infrastructure for basic development and democratic socialization.

4.2Transition and Challenge (1960s): Urbanization and Shifting Landscapes

Japan's rapid economic growth and industrialization in the 1960s brought profound social change: massive rural-to-urban migration, diversification of lifestyles, and weakening traditional community bonds (Kosai, 1997; Inoue, 2015). Kominkan faced an identity crisis. In rural and depopulating areas, they often remained vital 'lifestyle centers,' providing essential social glue. In burgeoning urban areas, however, their traditional role was less clear, and they risked becoming irrelevant (Yamamoto, 2003).

Kominkan adapted by:

- Emphasizing the 'Center' Role: Shifting focus towards being a hub for bringing together diverse urban residents, facilitating connection in anonymized environments.
- Diversifying Programs: Responding to increasingly individualized and sophisticated learning needs emerging from urbanization and rising incomes (Inoue, 2015).
- Highlighting Cultural and Educational Functions: Positioning themselves clearly as facilities for learning and cultural enrichment, distinct from purely recreational spaces.

This period highlighted Kominkan's need for constant adaptation to socio-economic contexts to remain relevant community assets – a core tenet of CBSD, which requires responsiveness to changing local conditions and challenges.

43Reconstruction and Lifelong Learning Foundations (1970s): Broadening Horizons

The 1970s marked a critical turning point in Japan's approach to social education, shaped by the growing global discourse on lifelong education. Influenced by international trends and domestic social changes, Japan began to broaden its educational vision beyond formal schooling. A key milestone was the 1971 report by the Council for Social Education, which redefined social education as encompassing diverse learning activities across the lifespan. This redefinition explicitly aligned with the emerging concept of lifelong education and emphasized the importance of continuous, community-rooted learning (MEXT, 2021a). During this period, Kominkan were repositioned as essential institutions for rebuilding local community cohesion, particularly in response to the social fragmentation experienced in the 1960s (Yamamoto, 2003).

One of the most significant shifts was the reframing of social education to support lifelong learning. This new perspective required expanding both the content and methods of community learning, encouraging more participatory forms such as group-based learning and volunteer activities. At the same time, alternative institutions such as culture centers and university extension programs began to flourish, offering different models of community engagement. However, Kominkan distinguished themselves by grounding their programming in community needs and maintaining a strong emphasis on fostering social solidarity. In contrast to the culture centers' focus on the 'culture of daily life,' Kominkan explicitly sought to contribute to broader community development goals (Yamamoto, 2003).

This decade also saw the beginning of conceptual and functional reconstruction within Kominkan as they moved beyond their original post-war educational mission. They increasingly engaged in discussions around the role of social education facilities in community empowerment, exploring how such institutions could serve as platforms for learning societies. These developments laid the conceptual groundwork for later approaches to CBSD, positioning Kominkan as both educational and social catalysts in their local contexts.

4.4Embracing Lifelong Learning and Networking (1980s-1990s): Pivoting Towards Integration

The 1980s solidified Japan's commitment to lifelong learning. Key reports (Central Council for Education, 1981; National Council on Educational Reform, 1984) and the 1990 Law on the Development of Systems for Promoting Lifelong Learning provided a robust policy framework (Yamamoto, 2003; MEXT, 2021b). Kominkan were reimagined as core facilities within this system.

Their functions evolved significantly:

- Beyond Direct Provision: While continuing classes and lectures, Kominkan were tasked with enhanced roles in "liaison, coordination, and evaluation" within the lifelong learning network (Yamamoto, 2003, p. 85).
- Networking Hub: Kominkan became crucial social nexuses for connecting educational institutions (schools, universities), local government, NGOs, NPOs, and citizen groups. This network-building function facilitated knowledge dissemination and mobilized community participation – essential for integrated CBSD (Inoue, 2015).
- Addressing Contemporary Issues: Reports explicitly called for Kominkan to address themes like recurrent education, volunteer support, youth activities, and contemporary social issues (MEXT, 2021b).
- Facing Fiscal Reality: The abolition of national construction subsidies in 1997 forced municipalities to prioritize locally relevant facility development and operation models, increasing pressure for efficiency and demonstrable community value (Yamamoto, 2003).

This era marked Kominkan's transition towards being integrated community hubs focused on learning, connection, and addressing contemporary challenges.

5.Human Resources: Staffing the Engine of Community Development

The effectiveness of Kominkan in fulfilling their diverse functions, including CBSD, hinges significantly on their human resources, a structure that presents both opportunities and challenges. The Social Education Law (amended 1959) stipulates that Kominkan staff, led by a director (*Kominkan-Shuji*), are responsible for implementing facility programs, while a manager (*Kominkan-Cho*) oversees administration and planning (NIER, 2018). Staff are crucial for understanding local needs, designing relevant programs, providing learning consultation, fostering group activities, and building partnerships, making their role inherently facilitative and community-liaison oriented (Inoue, 2015).

In fact, the staffing model is dominated by part-time roles. Most of Kominkan lack a full-time Director (Inoue, 2015). The typical staffing arrangement involves a small number of municipal employees, such as a manager and sometimes a director, supplemented by numerous part-time lecturers, facilitators, and volunteers, resulting in

an average of less than one full-time staff member per Kominkan. While the Standards for Kominkan mention that staff should have social education knowledge and experience, formal qualifications are not strictly mandated. Consequently, capacity development relies heavily on training provided by prefectural and national bodies, such as the National Kominkan Association. Developing professional competence, especially for part-time Directors who are responsible for managing entire facilities, remains an ongoing challenge (Inoue, 2015; Sato, 2016).

Despite these difficulties, the reliance on local part-time staff and volunteers offers potential advantages for CBSD. These individuals often possess deep local knowledge and networks, which are crucial for understanding community sustainability challenges and building trust. Their involvement fosters a sense of community ownership and relevance, and volunteers can bring diverse skills and perspectives from various professional backgrounds. However, effectively integrating complex CBSD and ESD approaches requires significant facilitator skill in participatory methodologies, systems thinking, and project management. The part-time, often under-resourced nature of Kominkan staffing can hinder the consistent, high-quality delivery of these sophisticated programs and limit strategic networking capacity. As such, securing and training competent personnel, particularly that adept at facilitating community-led sustainability initiatives, remains a critical issue (Inoue, 2015).

Table 1
Kominkan Staffing Scenarios

Scenario	Typical Staff Composition	Prevalence
Most Common	Kominkan Manager (*Kominkan-cho*) + Kominkan Staff	High
Less Common	Kominkan Manager (*Kominkan-cho*) + Kominkan Director (*Kominkan-shuji*) + Kominkan Staff	Medium
Exceptional	Kominkan Manager (*Kominkan-cho*) + Social Education Supervisor (*Shakaikyoiku-shuji*) + Kominkan Staff	Low

6.Kominkan as Hubs for Community-Based Sustainable Development and ESD

The current paper argues that the historical trajectory and core functions of Kominkan highlights that they are facilities for not only fostering mutual learning, building social cohesion, responding to local needs, and acting as networking hubs, but also providing a natural foundation for contemporary CBSD. This alignment has become increasingly explicit, particularly through the integration of ESD.

The functions and operational philosophy of Kominkan exhibit a strong alignment with the principles of CBSD, both inherently and through explicit adoption of related frameworks. Inherently, Kominkan's traditional approach resonates with CBSD's core

tenets. Their programs typically stem from participatory needs assessments, a cornerstone of CBSD, ensuring relevance to community-identified issues. By facilitating interaction across generations and social groups, Kominkan build the trust and networks, or social capital, that are essential for collective action on sustainability issues (Putnam, 2000). Furthermore, their learning activities, often focused on problem-solving, empower residents to take ownership of local challenges, thereby fostering local agency (Abdellatif & Hisai, 2021). This is complemented by a holistic approach that often integrates cultural, social, economic, and, increasingly, environmental dimensions, while their widespread presence is designed to ensure accessibility and inclusion for diverse community members.

This inherent alignment has been strengthened by an explicit embrace of ESD and DRR. The UN Decade of Education for Sustainable Development (2005-2014) and the subsequent Global Action Programme provided a significant impetus for Kominkan to be recognized as key platforms for ESD in Japan (Okayama Municipal Kominkan, 2014) that consequently promotes sustainability awareness effectively (Abdellatif, 2025). The Japanese National Commission for UNESCO (JNCU) explicitly highlighted this role, citing pioneering examples like the Kyoyama Kominkan's environmental activities and the Okayama ESD Project, which leveraged Kominkan as central hubs in a regional network (JNCU, 2015). The 2011 Great East Japan Earthquake and Tsunami profoundly solidified their role in sustainability. Many Kominkan transformed into vital emergency shelters and coordination centers, and in the aftermath, became focal points for community-based DRR planning, training, and memorialization, thereby cementing their function in building community resilience (Berkes & Ross, 2013; Makino, 2018; Shaw & Takeuchi, 2012). Consequently, many Kominkan now offer programs explicitly framed as ESD and act as catalysts for local networks, facilitating networking (JNCU, 2015, p. 16) that bring together schools, NGOs, businesses, and local government for sustainability initiatives.

Beyond formal programs, Kominkan serve crucial CBSD functions as multi-functional hubs. Most of their usage involves community groups, such as NPOs and neighbourhood associations, renting space, which provides the essential physical infrastructure for civic organization and local initiatives (Inoue, 2015). They also function as informal meeting grounds where casual social interactions build community cohesion and enable collaboration on local issues because most of Kominkan activities are classified into "cultural and social activities or community development activities" (Abdellatif, 2021, p. 29). This role as a neutral and accessible venue allows them to be effective spaces for communities to gather, discuss local challenges ranging from waste management to aging populations, and collaboratively seek solutions.

7.Discussion: Resilience, Adaptation, and Challenges in the CBSD Role

The development of Kominkan from centers for post-war reconstruction to important contributors to CBSD reflects their strong institutional resilience and ability to adapt to changing circumstances. Several key factors have supported this evolution. One

important factor is their close connection to local communities. Because Kominkan are located within neighborhoods and are designed to respond to local needs, they remain relevant and trusted by residents. This local presence encourages a sense of ownership and participation among community members.

Another important strength of Kominkan is their ability to adjust their functions. Over the years, they have responded to shifts in national policy, such as the promotion of lifelong learning and ESD, as well as to social changes like urbanization, population aging, and natural disasters. This flexibility has helped them stay meaningful and useful in different contexts. In addition, Kominkan have increasingly taken on the role of community networking hubs. This means they are well positioned to bring together various stakeholders to work on complex sustainability issues that require cooperation across sectors.

Government policy has also played a significant role, although support has changed over time. In the early years, national policies and funding were strong and helped establish Kominkan across the country. In more recent years, support has depended more on local governments, which can vary in their commitment. However, national frameworks such as the Social Education Law, the Lifelong Learning Promotion Law, and ESD-related policies still provide an important foundation that legitimizes the work of Kominkan.

Despite these positive qualities, Kominkan continue to face several challenges. One major issue is limited human resources. Many Kominkan rely heavily on part-time staff and volunteers. While this helps them stay connected to local needs, it can make it difficult to carry out tasks that require advanced planning, long-term coordination, and skilled facilitation. To address this, there is a need for greater investment in staff training and more stable employment structures. Another challenge is balancing multiple roles. Kominkan serve as learning centers, meeting spaces, rental facilities, and ESD promoters. This wide range of activities can make it difficult to maintain a clear focus and may lead to confusion about their main mission. Regular strategic reviews can help clarify priorities and strengthen their CBSD contributions.

Measuring the impact of Kominkan activities is also a concern. While participation numbers are commonly used, they do not fully show how these activities contribute to sustainable development. More effective tools and methods are needed to assess outcomes in a meaningful way. Lastly, Kominkan often face competition for resources from other local institutions such as libraries and cultural centers. Limited municipal budgets may reduce the funding available for Kominkan, especially for programs directly related to CBSD. Overcoming these challenges will be essential for Kominkan to continue playing a strong role in promoting sustainability within communities.

8.Conclusion: Kominkan as a Global Model for Sustainable Community Learning

This analysis demonstrates that Kominkan are far more than simple community halls. Born from the urgent need for democratic renewal and community rebuilding after

World War II, they have evolved into sophisticated, multi-functional institutions uniquely positioned to drive community-based sustainable development. Their history reveals a consistent core mission: empowering individuals and strengthening communities through accessible, participatory learning and social connection.

Kominkan's strength lies in their deep community roots, inherent flexibility, and ability to function as social infrastructure that fosters agency, builds social capital, and facilitates collective action. Their explicit integration of ESD and DRR in recent decades marks a significant evolution, aligning their historical mission with the paramount global challenge of sustainability. Examples like Kyoyama Kominkan and the Okayama ESD Project illustrate their potential as central nodes in local sustainability networks.

However, realizing their full potential as CBSD engines requires addressing critical challenges, most notably the capacity limitations stemming from staffing structures dominated by part-time roles. Strategic investment in developing the professional competencies of Kominkan staff, particularly in participatory facilitation, ESD methodologies, and network management, is paramount. Furthermore, municipalities and national policymakers must recognize and resource Kominkan explicitly for their vital role in fostering sustainable, resilient communities.

In offering the Kominkan as a global model, it is useful to contrast it with other community learning infrastructures. While many European community centers or North American public libraries excel at providing social services or access to information, the Kominkan model is uniquely characterized by its dual function. It is simultaneously a grassroot, community-owned space and an official institution for non-formal education. This formal legal and administrative link, combined with its programmatic flexibility, creates a robust framework for implementing coordinated, community-wide initiatives like CBSD and DRR in a way that purely voluntary hubs or information-focused libraries may find difficult to sustain.

In an era grappling with climate change, social fragmentation, and economic uncertainty, investing in such accessible, community-owned learning centers is not merely educational policy; it is a fundamental development strategy. Kominkan stand as a testament to the enduring power of community-based learning as a foundation for building just, resilient, and sustainable societies. Future research should focus on detailed case studies of Kominkan-led CBSD initiatives and robust methodologies for evaluating their long-term impact on community sustainability indicators.

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From games to grit: Examining the impact of structured play activities on persistence development in early childhood settings

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Abstract

Introduction: *Persistence is recognized as a foundational skill for success in life, contributing significantly to the formation of a growth mindset in early childhood, enabling preschoolers to overcome obstacles and complete tasks. The current research is justified by an observed deficit in motivation and persistence among current young generations, who often tend to give up at the first obstacle or failure, and by a gap in applied studies within the Romanian context. The study's primary objective was to investigate how persistence, defined as the ability to maintain effort in the face of difficulties, can be developed in preschoolers through an intervention program based on interactive activities and board games.*

Methods: *The research utilized an experimental design involving two groups of large-group preschoolers (aged 4 to 5). The experimental group participated in a nine-week intervention program consisting of 13 structured activities, including seven board games and five different interactive activities. Persistence was evaluated using the Dimensions of Mastery Questionnaire (DMQ), tracking five specific subdomains: cognitive persistence, motor persistence, social persistence (with adults and children), and mastery enjoyment.*

Results *demonstrated that the intervention significantly improved total persistence in the experimental group when compared to both the pretest phase and the control group. Statistically significant increases were observed, particularly in cognitive persistence, motor persistence, and enjoyment of mastering new skills. The post-intervention differences between the experimental and control groups became even more pronounced and statistically significant for all subscales, sustaining the program's effectiveness. However, the study found no statistically significant influence based on gender or the quality of the relationship with the educator on persistence development.*

Conclusions: *These findings validate the effectiveness of game-based methods in early education, suggesting that integrating educational games that require patience, concentration, and task completion is a developmental capacity that supports success later in*

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life. The study underscores the role of parents and teachers in providing adequate support and showing children that constant effort is more valuable than immediate success. Future research should address methodological limitations, such as pre-existing group differences and subjective evaluation, by conducting longitudinal studies and implementing external pretest/posttest evaluation.

Keywords: early education, persistence, interactive activities, board games, intervention programs.

Introduction

Persistence is an essential skill for success in life, and its development during early childhood significantly contributes to the formation of a growth mindset (Dweck, 2006). At the preschool age, children begin to explore the world through play, discovery, and social interactions. Persistence enables them to overcome obstacles, complete tasks, and strengthen their skills. A persistent child is more self-confident and less likely to become frustrated or give up when faced with difficulties (Fortin & Picard, 1999; Negură, 2023). This aspect is particularly important in the current context, where the rapid pace of change and the challenges of academic and social environments demand increased adaptability and resilience.

The importance of research in the field of early education and the development of personal competences is underlined by the need to cultivate persistence as an essential quality from early childhood, as it has a significant influence on a child's future success. Parents and educators have an essential role to play, as it is essential to provide adequate support, to encourage children to try again when they fail, and to show them that constant effort is more valuable than immediate success. Activities involving problem solving, building games, and creative projects also contribute to the development of this trait.

The current research is justified by a gap observed in the literature, especially the lack of applied studies in the Romanian context. It has also been found that current generations of young children show a certain deficit in maintaining desire and motivation (Jipa et al., 2023), tending to give up at the first obstacle or failure (Chaudhuri, 2020; Hatos, 2014; Twenge, 2009; Young et al., 2018). Therefore, this study aims to shed light on how persistence can be developed in preschoolers through the implementation of an intervention program based on interactive activities and table games. This type of approach allows for applied educational experiments to be carried out, contributing educational, psychological, and practical value in the field of early childhood education.

Theoretical Background

Persistence can be defined as the ability to maintain effort and motivation in the face of obstacles to achieve long-term goals (Duckworth, 2016). It is often associated with the concept of "grit," which combines sustained passion with endurance (Duckworth et al., 2007). Key characteristics of persistence include determination—the commitment to overcome obstacles—self-discipline—the ability to stay focused on goals—and

resilience—the capacity to recover from setbacks (Duckworth, 2016; Duckworth et al., 2007; Duckworth & Quinn, 2009).

Persistence is frequently confused with *perseverance*, though the two constructs are distinct (Duckworth et al., 2007). While both involve sustained effort, *perseverance* generally refers to continued effort on a specific task, often without broader motivational or self-regulatory components (Duckworth & Quinn, 2009). Persistence, in contrast, represents a more comprehensive, trait-like ability to maintain motivation and engagement across challenges and over time (Cloninger et al., 1993; Eisenberg et al., 2010). Cloninger et al. (1993) define persistence as *the capacity to keep striving toward a goal despite fatigue or frustration* and characterize it as a temperamental dimension that is independently heritable and manifests early in life. This trait-like quality is further supported by research showing that individual differences in children's self-regulation and effortful control demonstrate fairly stable patterns after the first year or two of life (Eisenberg et al., 2010; Rothbart & Bates, 2006).

The overlap between the terms in both popular and academic usage has contributed to this confusion, as both involve determination, resilience, and goal-directed behavior (Duckworth et al., 2007). Clarifying this distinction is essential, particularly in research on early childhood, where interventions aim to foster not only repeated effort on individual tasks but also the general capacity to sustain motivation across diverse challenges (Lunkenheimer et al., 2019; Montroy et al., 2016). Lunkenheimer et al. (2019) conceptualize task persistence as *the capacity to sustain effort towards a task-oriented goal over time* as an important aspect of self-regulation in early childhood, emphasizing its broader developmental significance beyond simple task completion.

In this study, the development of *persistence* in preschoolers was examined across five subdomains of personality (Morgan et al., 2020). *Cognitive persistence* refers to the ability to stay focused and solve intellectual tasks despite difficulties. *Motor persistence* measures determination during physical activities, even when fatigued or challenged. *Social persistence with adults* captures preschoolers' capacity to maintain interactions with adults in less comfortable situations, while *social persistence with peers* assesses engagement and persistence in peer relationships. *Mastery enjoyment* reflects children's satisfaction and pleasure in improving skills and achieving proficiency in specific tasks. Each of these forms of persistence contributes substantially to a child's academic and social development.

Research indicates that children with higher persistence demonstrate improved academic habits, such as planning and completing tasks, and are more likely to achieve long-term educational goals (Duckworth, 2016; Duckworth et al., 2007; Duckworth & Quinn, 2009). Persistence also supports the development of healthy interpersonal relationships, enabling children to navigate social challenges effectively (Furlong et al., 2014).

Several developmental theories provide a framework for understanding persistence. Erikson's psychosocial stages theory (Erikson, 1963; Maree, 2022) emphasizes early childhood, particularly ages three to six, as a critical period for cultivating persistence,

with exploration and experimentation—without fear of failure—supporting self-confidence. (Piaget, 2003)'s constructivist theory highlights the importance of hands-on experiences and problem-solving challenges in fostering persistence (Waite-Stupiansky, 2022). Consistent with this, structured games should encourage children to push cognitive boundaries. Vygotsky (2024)'s socio-cultural approach further suggests that these challenges are most effective when guided by knowledgeable adults or peers, expanding the Zone of Proximal Development (Bernard, 2024; Vygotsky, 2024). Dweck (2006)'s growth mindset framework underscores the role of educators in framing failure as a learning opportunity and emphasizing effort over outcomes (Clifton et al., 2025; Dweck, 2024).

Empirical studies support these theoretical insights. Haber et al. (2022) found that exposing 4- to 5-year-old children to storybooks about scientists, particularly stories emphasizing challenges and failures, effectively enhanced persistence, demonstrating the value of learning from setbacks. Oeri et al. (2020) examined the relationship between executive functions and persistence in kindergarteners, showing that children with stronger cognitive flexibility and inhibitory control persisted longer in difficult tasks, whereas those with weaker executive functions were more likely to abandon tasks or cheat. Morgan et al. (2020) assessed mastery motivation using the Dimensions of Mastery Questionnaire (DMQ) and found that children scored highest on learning satisfaction and motor persistence, but lower on social persistence with peers, highlighting the need for parental and teacher support.

Although board games and interactive activities may seem promising at first glance as a method for developing basic skills, research shows that their effectiveness in developing persistence is heterogeneous, with mixed effects reported depending on context, population, and implementation. For example, Rotem and Arnon (2019) found that persistence is positively associated with difficulty in game-based learning, with the most determined learners being highly persistent across topics. E. Barton et al. (2018) showed successful board game interventions for children with disabilities, while J. Leonard et al. (2021a) acknowledged the critical need for more research on persistence interventions. Persistence is a malleable attribute, particularly during childhood, and can be significantly enhanced through targeted educational interventions (Alan et al., 2019). However, the overall researchers' results are limited, with most studies showing small to moderate effects and calling for more rigorous investigation.

Despite these contributions, there remains a lack of applied research on persistence in the Romanian context, justifying the present study. The proposed intervention builds on prior evidence demonstrating the effectiveness of games and interactive activities in fostering persistence. Such activities help children manage failure, develop problem-solving strategies, practice patience, and enhance key social skills, including cooperation, rule-following, and emotional regulation. Therefore, the intervention was designed to cultivate persistence and social-emotional skills through structured, engaging, and developmentally appropriate activities.

Research Methodology:

The specific objectives of the study were to: (1) examine the effectiveness of the structured play intervention program in enhancing persistence, both overall and across its subdomains, in the experimental group following implementation; (2) compare persistence development between the experimental group, which participated in the interactive activities and board games program, and the control group, which did not receive the intervention; and (3) investigate the influence of individual factors, specifically gender and the quality of the child-educator relationship, on the development of persistence among preschoolers.

Hypotheses:

We hypothesized that the implementation of an intervention program based on interactive activities and table games would lead to an improvement in persistence in the experimental group in the posttest phase compared to the pretest phase (H1) and in the experimental group compared to the control group (H2).

Additionally, we hypothesized that persistence would vary according to individual characteristics, specifically gender, with differences expected between girls and boys (H3), and the quality of the relationship with educators, with higher persistence expected in children who have a positive relationship with their educators (H4).

Variables:

Table 1.
Summary of Hypotheses and Corresponding Variables

Hypothesis	Independent Variable (IV)	Dependent Variable (DV)	Comparison / Notes
H1	Implementation of intervention program (pretest vs. posttest)	Level of persistence	Within the experimental group over time
H2	Group type (experimental vs. control)	Level of persistence	Between-group comparison after intervention
H3	Gender (girls vs. boys)	Level of persistence	Between-gender comparison
H4	Relationship with educators (poor vs. good)	Level of persistence	Within the experimental group, based on the relationship quality

Sample of participants:

The study was conducted in the school year 2024/2025, from November through December. The experimental and control groups were two groups of rural, large-group

preschoolers. The children in the two groups ranged in age from 4 to 5 years, with an age difference between them of a maximum of 1 year.

Table2.
Characterization of the Experimental and Control Groups

Aspect	Experimental group	Control group
Location	Location A (Rural Preschool 1)	Location B (Rural Preschool 2)
No. children	23	27
Girls	16 (69.6%)	12 (44.4%)
Boys	7 (30.4%)	15 (55.6%)
Description	A large preschool group with a predominantly female gender composition, children who may respond differently to interventions due to gender composition, and a smaller number of participants.	A large preschool group with a predominance of boys; a larger group from the same institution but a different structure, which may influence the dynamics and outcomes of the study.

Description of the intervention program

Thirteen activities were applied to the experimental group over an approximate period of 2 months (9 weeks): November and December 2024. The intervention program consisted of interactive activities and table games, on different themes and topics, under different forms of organization and implementation, as part of language education activities.
The intervention comprised 13 activities, each lasting approximately 20–30 minutes. These included seven board game activities, five interactive activities, and one concluding session for feedback and reflections, which was finalized with awards for the children. In the following, we describe each activity individually as follows:

Table 3
Intervention Program Overview: Purposes, Objectives, and Resources

Nr.	Purpose	Main objectives	Brief description	Teaching materials
	Puzzles – varied.			
1	Develop patience and persistence	Stimulating logical thinking, spatial orientation, persistence	Children assemble wooden jigsaw puzzles, starting at an easy level, then harder, in teams, with mutual support	Wooden or cardboard puzzles, 5 difficulty levels
	Unstable tower.			
2	Fine motor development	Develop self-control, creativity, and persistence	Building a stable tower out of Jenga cubes, in teams, with restorations after collapse	Wooden cubes, Jenga game
	Discover the picture.			
3	Developing logical thinking, attention	Concentration, route anticipation, persistence	Joining dots on cards of increasing difficulty, with peer help	Dotted sheets, graphing pencils
	Rings on the post.			
4	Developing persistence	Force and direction control, rehearsal for performance	Throwing hoops on poles in teams with encouragement and friendly competition	Plastic poles, colored hoops, and small tables
	A glass of hot "milk."			
5	Stimulating teamwork	Socialization, empathy, persistence	Passing a glass of hot water in a semicircle, carefully and collaboratively	Paper cup, warm water, small table
	Sorting colored balls.			
6	Developing visual perception	Sorting balls by color, persistence	Moving balls into teams for color grouping, cooperation, and support between children	Tables, paper cups, colored balls
	Draw the other half.			
7	Developing creativity and flexible thinking	Imagination, persistence in correcting drawings	Completing drawings on worksheets, with explanations and individual support	Cards with half drawn, colored pencils and graphs
	Don't drop the ball.			
8	Increase general motor coordination	Eye-hand-foot-eye coordination, persistence	Walking the course with the ball on the paddle, in teams, resuming if dropped	Tennis balls, paddles, and string for trail
	Card memory.			
9	Developing attention and visual memory	Card position memorization, patience, concentration	Memory game with picture cards, in small groups, with peer support	Memory cards set
	Mime emotions.			
10	Developing expressiveness and empathy	Recognizing and expressing emotions, non-verbal communication, and persistence	Mime emotions one at a time, team guessing, encouragement, and final discussion	Drawn emotion cards

	Map of Romania.			
11	Developing patience and persistence	Creativity, patience in crumpling and gluing paper, dexterity	Crumpling crepe paper and pasting it on the map of Romania worksheet without a time limit	Glue, colored crepe paper, a map sheet, bowls
	Christmas tree.			
12	Developing the aesthetic-creative sense	Hand muscles, hand-eye coordination, creativity	Knitting with colored yarn on a perforated Christmas tree, with multiple attempts and remakes	Perforated wicker, colored mohair yarn
	Children's awards - a festive moment.			
13	Appreciation of hard work	Awareness, motivation, pride, fair play	Individual and collective feedback, awarding diplomas and sweet prizes, encouragement and applause	Diplomas, sweets, blue thread

Research methods and tools:

The main instrument employed was the "Dimensions of Mastery Questionnaire" (DMQ), adapted from Morgan et al. (2020), which is organized into seven subscales, each corresponding to five items on the observation grid. However, two subscales (Negative Reactions to Challenges and General Competence) fell outside the scope of this research and were therefore excluded from the analyses.

The study examined the development of persistence across five subdomains of child personality. *Cognitive persistence* was assessed by children's ability to stay focused and solve intellectual tasks despite difficulties. *Motor persistence* measured the determination shown during physical activities despite fatigue or obstacles. *Social persistence with adults* tracked preschoolers' capacity to maintain interactions and relationships with adults, even in less comfortable situations, while *social persistence with peers* evaluated their engagement and persistence in relationships with other children. Finally, *enjoyment of mastery* reflected children's satisfaction and pleasure as they improved their skills and became more proficient in specific tasks.

Data analysis procedure:

Hypothesis testing was conducted using independent samples and paired samples t-tests, respectively. To provide a more concrete analysis of persistence development, we examined it across multiple variables. Specifically, the first hypothesis evaluated persistence levels for the entire experimental group through pretest-posttest comparisons. The second hypothesis entailed separate analyses of both groups at the pretest and posttest phases. The third hypothesis investigated the influence of gender on preschoolers' persistence development, while the fourth hypothesis assessed the impact of teacher-student relationships on persistence outcomes.

Analysis and interpretation of results:

Hypothesis 1: The implementation of an intervention program based on interactive activities and table games will lead to improved persistence in the experimental group in the post-test phase.

Table 4

Descriptive Statistics and t-test for the Experimental Group (Pretest vs. Posttest)

Persistence Subscale	$M_{Pretest}$	$SD_{Pretest}$	$M_{Posttest}$	$SD_{Posttest}$	t	df	p
Total Persistence	3.696	0.622	4.056	0.613	-6.001	22	< .001
Cognitive Persistence	3.452	0.798	4.261	0.834	-8.714	22	< .001
Motor Persistence	4.096	0.657	4.33	0.676	-2.677	22	.014
Social Persistence with Adults	3.357	0.615	3.409	0.665	-0.646	22	0.525
Social Persistence with Children	3.557	0.629	3.591	0.73	-0.569	22	0.575
Mastery enjoyment	4.017	0.721	4.687	0.447	-6.293	22	< .001

Results show a significant improvement in total persistence (p < .001) in the experimental group after the intervention, supporting Hs1. Notable and statistically significant increases were observed in cognitive persistence (p < .001), motor persistence (p = .014), and mastery enjoyment (p < .001). Social persistence with adults and children showed modest but not statistically significant increases (p > .05), which may be attributed to preschoolers' familiarity with the educator and the predominantly individual nature of the kindergarten activities aimed at autonomy.

Hypothesis 2: The implementation of an intervention program based on interactive activities and table games will lead to improved persistence in the experimental group.

Table 5.

Comparative Descriptive Statistics (Pretest and Posttest) for the Experimental and Control Groups

Persistence Subscale	$M_{GE\ Pretest}$	$SD_{GE\ Pretest}$	$M_{GC\ Pretest}$	$SD_{GC\ Pretest}$	$M_{GE\ Posttest}$	$SD_{GE\ Posttest}$	$M_{GC\ Posttest}$	$SD_{GC\ Posttest}$
Total Persistence	3.696	0.622	2.905	0.44	4.056	0.613	2.873	0.376
Cognitive Persistence	3.452	0.798	2.719	0.691	4.261	0.834	2.57	0.554
Motor Persistence	4.096	0.657	2.793	0.636	4.33	0.676	2.748	0.581
Social Persistence with Adults	3.357	0.615	2.822	0.737	3.409	0.665	2.719	0.601
Social Persistence with Children	3.557	0.629	2.941	0.697	3.591	0.73	2.822	0.638
Mastery Enjoyment	4.017	0.721	3.252	0.762	4.687	0.447	3.504	0.575

Table 6

t-test for Group Comparison (Pretest and Posttest)

Persistence subscale	$t_{Pretest}$	$p_{Pretest}$	$t_{Posttest}$	$p_{Posttest}$
Total persistence	-5.245	< .001	-8.36	< .001
Cognitive Persistence	-3.484	.001	-8.553	< .001
Motor Persistence	-7.109	< .001	-8.906	< .001
Social Persistence with Adults	-2.755	.008	-3.856	< .001
Social Persistence with Children	-3.255	.002	-3.976	< .001
Mastery Enjoyment	-3.63	< .001	-8.02	< .001

At pretest, the experimental group demonstrated significantly higher levels of persistence on all subscales compared to the control group (all $p < .05$). This initial difference is important to note. After the intervention, at posttest, the differences between the experimental and control groups became even more pronounced and statistically significant for all subscales (all $p < .001$). This indicates a significant positive impact of the intervention on the experimental group, sustaining Hs2. Even with a higher baseline in the experimental group, the significant increase over the control group supports the effectiveness of the program. The control group had relatively constant values between pretest and posttest, suggesting that without the intervention, persistence did not significantly improve.

Hypothesis 3: There are statistically significant differences in the level of development of persistence in preschool-age children in the high preschool group by gender.

Table 7

Descriptive Statistics by Gender (Whole Sample)

Persistence subscale	Gender	$M_{Pretest}$	$SD_{Pretest}$	$M_{Posttest}$	$SD_{Posttest}$	$t_{Pretest}$	$p_{Pretest}$	$t_{Posttest}$	$p_{Posttest}$
Total Persistence	Girls	3.353	0.691	3.536	0.774	1.017	0.314	1.233	0.224
	Boys	3.162	0.615	3.265	0.763				
Cognitive Persistence	Girls	3.193	0.81	3.55	1.118	1.339	0.187	1.489	0.143
	Boys	2.882	0.823	3.091	1.034				
Motor Persistence	Girls	3.536	0.949	3.621	1.045	1.259	0.214	1.153	0.254
	Boys	3.209	0.859	3.291	0.954				
Social Persistence with Adults	Girls	3.071	0.774	3.05	0.725	0.037	0.97	0.155	0.878
	Boys	3.064	0.683	3.018	0.717				
Social Persistence with Children	Girls	3.271	0.693	3.25	0.711	0.515	0.609	0.756	0.454
	Boys	3.164	0.785	3.082	0.863				
Mastery Enjoyment	Girls	3.693	0.808	4.207	0.741	0.851	0.399	1.64	0.107
	Boys	3.491	0.863	3.845	0.814				

Table 8

t-test for Gender Comparison (Control Group, Experimental Group)

Group	Control Group				Experimental Group			
Persistence subscale	Pre-test		Posttest		Pretest		Posttest	
	t	*p*	*t*	*p*	*t*	*p*	*t*	*p*
Total Persistence	-1.043	0.307	-0.642	0.527	0.772	0.449	0.195	0.847
Cognitive Persistence	-0.232	0.818	-0.444	0.661	1.122	0.274	0.548	0.589
Motor Persistence	-0.917	0.368	-0.916	0.368	1.014	0.322	0.337	0.739
Social Persistence with Adults	-1.667	0.108	-1.184	0.248	1.108	0.28	0.041	0.968
Social Persistence with Children	-0.267	0.792	-0.04	0.969	-0.073	0.942	-0.158	0.876
Mastery Pleasure	-0.211	0.835	0.502	0.62	0.321	0.751	0.009	0.993

The statistical analysis showed no statistically significant differences in the level of persistence development by gender, neither in the control nor in the experimental group, nor the whole sample, both at pretest and posttest (all $p > 0.05$).

Although girls had higher initial scores and maintained an advantage, these differences were not statistically significant. This refutes Specific Hypothesis 3, suggesting that the intervention program had a balanced impact on both genders and that persistence develops similarly in girls and boys, possibly due to the fact that the activities were not differentiated by gender.

Hypothesis 4: The implementation of an intervention program based on interactive activities and table games will lead to improved persistence in preschoolers who have a good relationship with their educators, compared to those who have a poor relationship with their educators.

Table 9.
Descriptive Statistics on Relationship with Educator (Control and Experimental Group)

Persistence Subscale	Group	Relationship	$M_{Pretest}$	$SD_{Pretest}$	$M_{Posttest}$	$SD_{Posttest}$
Total Persistence	Control	Good	2.969	0.427	2.899	0.363
		Poor	2.796	0.462	2.828	0.414
	Experimental	Good	3.711	0.57	4.009	0.566
		Poor	3.676	0.716	4.116	0.695
Cognitive Persistence	Control	Good	2.812	0.661	2.671	0.519
		Poor	2.56	0.747	2.4	0.596
	Experimental	Good	3.508	0.671	4.215	0.781
		Poor	3.38	0.973	4.32	0.939
Motor Persistence	Control	Good	2.765	0.593	2.718	0.566
		Poor	2.84	0.735	2.8	0.632
	Experimental	Good	4.154	0.53	4.323	0.656
		Poor	4.02	0.819	4.34	0.737
Social Persistence with Adults	Control	Good	2.941	0.793	2.8	0.64
		Poor	2.62	0.614	2.58	0.529
	Experimental	Good	3.415	0.551	3.338	0.574
		Poor	3.28	0.713	3.5	0.79
Social Persistence with Children	Control	Good	2.965	0.742	2.788	0.638
		Poor	2.9	0.648	2.88	0.668
	Experimental	Good	3.462	0.714	3.492	0.76
		Poor	3.68	0.509	3.72	0.707
Mastery Pleasure	Check	Good	3.365	0.732	3.518	0.592
		Deficient	3.06	0.811	3.48	0.575
	Experimental	Good	4.015	0.695	4.677	0.444
		Poor	4.02	0.791	4.7	0.474

*Note**: **Good** relationship with educator = 17
Poor relationship with educator = 10

Table 10

t-test for Comparison on Relationship with Educator (Control and Experimental Group)

Persistence subscale	Control Group				Experimental Group			
	Pretest		Posttest		Pretest		Posttest	
	t	*p*	*t*	*p*	*t*	*p*	*t*	*p*
Total Persistence	-0.989	0.332	-0.465	0.646	-0.13	0.898	0.406	0.689
Cognitive Persistence	-0.911	0.371	-1.238	0.227	-0.373	0.713	0.292	0.773
Motor Persistence	0.292	0.773	0.35	0.729	-0.475	0.639	0.058	0.954
Social Persistence with Adults	-1.098	0.282	-0.916	0.368	-0.515	0.612	0.569	0.575
Social Persistence with Children	-0.229	0.821	0.355	0.726	0.819	0.422	0.734	0.471
Mastery Enjoyment	-1.004	0.325	-0.161	0.873	0.015	0.988	0.12	0.906

Statistical analysis did not reveal statistically significant differences in persistence development according to the quality of the relationship with the educator (good or poor), both in the control and experimental groups (all $p > 0.05$). This disproves Specific Hypothesis 4. Although descriptive statistics initially suggested that the relationship with the educator might influence mastery enjoyment, statistical tests did not support this conclusion. An explanatory factor could be that the activities of the experimental program were not carried out by the children's familiar educator, which could have affected the preschoolers' concentration and motivation in the presence of an unknown person.

Discussion and Limitations

Hypothesis 1 was supported, indicating that the intervention program based on interactive activities and board games produced a significant increase in total persistence in the experimental group at posttest. The improvements are obtained in the *cognitive persistence* and *motor persistence* subscales, suggesting that the intervention positively influenced both mental and motor effort endurance. These findings align with Morgan et al. (2020), who found that children scored highest on learning satisfaction and motor persistence, but lower on social persistence with peers. Moreover, children who independently generate new

strategies, rather than simply following instructions, tend to display higher levels of persistence in challenging tasks (Clinic, 2024). At the same time, Dowsett and Livesey (2000) indicate that preschool children with language disorders may show lower levels of persistence compared to control groups, even in tasks matched for difficulty. This suggests that reduced persistence may be influenced by individual factors and is not necessarily specific to a type of task.

Hypothesis 2 was confirmed. The intervention had a significant positive impact on the experimental group compared to the control group. Although the experimental group showed significantly higher persistence scores on all subscales at the pretest compared to the control group, the post-intervention differences between the groups became even more pronounced and statistically significant across all subscales. This may indicate a potential bias in the selection of the control group, as ideally, no significant baseline differences should have been present. Research demonstrates that comparing groups against their own baseline is methodologically invalid and can produce misleading conclusions (Gulz & Haake, 2024). In non-equivalent control group designs, selection bias and differences between intervention and control sites can confound results, making it essential to establish balance in the distribution of known risk factors at baseline (Leonard et al., 2021b). Furthermore, adjusting for baseline characteristics that differ between treatment arms can control for selection bias only under specific conditions (Formanek & Spaulding, 2024).

In practice, achieving true baseline equivalence is challenging when working with intact student groups (Campbell & Stanley, 2015; Shadish et al., 2002). Classes are pre-formed and cannot be reorganized for research purposes, and they naturally vary in academic levels, temperament, prior experiences, and teacher practices (Trask & Cowie, 2022). Randomizing individual students is usually infeasible due to scheduling, curricular, and ethical constraints, and the small number of available classes limits both statistical power and the likelihood of achieving equivalence (Ballance, 2024; Cook & Hatala, 2015; Hedges & Rhoads, 2010). Differences in classroom resources, group dynamics, and teacher–student interactions also create substantial baseline variability that is difficult to control (Hatos, 2006).

Given these constraints, the activities may not have produced the intended improvement in persistence. The group differences observed at posttest might have emerged regardless of the intervention. This interpretation aligns with broader findings on early childhood interventions. Many preschool interventions targeting simple academic skills demonstrate fadeout patterns, with effects diminishing by 50% or more in the first year following intervention programme completion (Bailey et al., 2020). Most interventions aimed at children's cognitive, social, or emotional development fail to track subjects beyond program completion, and when they do, complete fadeout is common (Meloy, 2019). Even high-quality preschool curricular interventions show effect fadeout when followed by quality instruction in primary grades (Bailey, 2017). Therefore, activities of this type may function more as engaging or entertaining experiences rather than as genuine developmental mechanisms for enhancing persistence in preschool children. The baseline

values cannot control for subsequent changes over time (Jylänki et al., 2022), suggesting that the observed group differences may reflect pre-existing characteristics rather than intervention-induced improvements.

Hypothesis 3 was not supported. The statistical analysis demonstrated no statistically significant differences in the level of persistence development based on gender.

This finding appears to contrast with some established research on gender differences in early childhood. Boys and girls internalize traditional gender roles from society beginning in early childhood and continuing through school years, which decisively affects their academic development, perceptions of their own abilities, and personal and professional aspirations (Gulz & Haake, 2024). Additionally, girls aged 3-18 years were found to be significantly more altruistic but less risk-tolerant, less competitive, and less trusting than boys, with these differences emerging early in life and persisting (Vansteenkiste & Deci, 2003).

However, the absence of significant gender differences in persistence in the current study may reflect an important conceptual and methodological consideration. Persistence refers to the intrinsic motivation to master a task and improve personally, being oriented toward process and development, while competitiveness involves extrinsic motivation centered on comparison with others and attaining superior status (Duckworth et al., 2007). This distinction becomes problematic in research when competitive tasks are used to measure persistence. Studies on competitive contexts have demonstrated that persistence can reflect either intrinsic motivation or ego-involved persistence, where individuals persist not from enjoyment but from ego concerns, making it difficult to determine whether children persist out of a desire to solve the problem or out of competitive motives (Hao et al., 2025). This is a particularly relevant issue in the context of gender differences, since boys tend to be more competitive than girls from an early age (Lunkenheimer et al., 2019; Vansteenkiste & Deci, 2003), which means that studies measuring persistence in competitive contexts may confound gender effects on persistence with gender effects on competitiveness.

To avoid this confusion, research should use non-competitive tasks to measure pure persistence and statistically control for participants' individual competitive tendencies. The current study's intervention design deliberately incorporated predominantly non-competitive, cooperative tasks to assess and develop persistence authentically. Activities such as assembling puzzles with mutual team support, building unstable towers with collaborative restoration after collapse, passing a glass of warm water carefully in a semicircle, and sorting colored balls with peer cooperation emphasized teamwork and individual mastery rather than interpersonal competition. Even activities that included elements of friendly competition, such as throwing rings on posts, were structured to prioritize encouragement and collective achievement over defeating others. This approach is methodologically important because persistence measures in competitive contexts can reflect ego-involved persistence rather than intrinsic motivation, making it difficult to determine whether children persist from enjoyment of the task or from competitive motives

(Hao et al., 2025). The intervention's emphasis on process-oriented activities—such as crumpling and gluing paper without time limits, completing drawings with individual support and corrections, and memory games with peer assistance—created conditions where persistence could emerge from genuine task engagement rather than competitive pressure. This non-competitive assessment approach may explain why no gender differences emerged in the current study, suggesting that when persistence is measured independently of competitive motivation through collaborative and mastery-focused activities, boys and girls demonstrate comparable levels of persistence in preschool years. *Hypothesis 4 was not supported*. The statistical analysis did not reveal statistically significant differences in persistence development based on the quality of the child's relationship with the educator (good or poor), although the means of motor persistence and mastery pleasure were higher (but not statistically significant) in children who had a good relationship with the educator.

Fiorilli et al. (2022) demonstrates that the teacher-student relationship quality positively affects persistence and effort, with these outcomes being more affected by the relational aspect of teacher support than by the instructional component. Social motivation theorists posit that children who experience social support from teachers will construct a positive sense of school membership and academic self-concept that will promote greater effort and persistence as well as commitment to school rules and norms (Byrnes et al., 1999). More specifically, behavioral engagement, defined as students' effortful and cooperative involvement in the classroom (working hard, persisting in the face of failure, and complying with classroom rules), is influenced by teacher-student relationship quality (Sutter et al., 2016). Close relationships with teachers are predictive of persistence in tasks, taking the initiative, and cooperative participation, while conflictual relationships lead to lower classroom engagement (Brooks & Goldstein, 2008; Zhang et al., 2023).

The lack of statistically significant differences may be due to the imbalance between the two groups (17 vs. 10), as the unequal group sizes reduce the statistical power of the comparison. The smaller group (weak relationship) can introduce greater variability, making it harder to detect real effects. In addition, the overall sample size of 27 participants limits the sensitivity of the statistical analyses. Internal variability within the groups may also contribute to these findings, as children in both the "good" and "weak" relationship groups can differ considerably in temperament, cognitive development, level of autonomy, and prior experiences.

Despite de evidence of the efficacy of these types of activities, the primary limitation constraining broad adoption is the paucity of longitudinal data demonstrating the long-term retention and generalized transfer of persistence skills (Akbarieh et al., 2025; Korteling et al., 2021). This is particularly important because persistence is a malleable attribute, especially during childhood, and can be significantly enhanced through targeted educational interventions (Alan et al., 2019). These interventions have been shown to increase students' willingness to choose challenging tasks and reduce their propensity to abandon effort after initial failure (Alan et al., 2019). However, most studies evaluate effects over a short duration,

and the literature on cognitive training strongly suggests that generalized effects across dissimilar contexts are statistically rare (Korteling et al., 2021). This gap raises questions about whether persistence learned in a specific game context can reliably transfer to high-stakes, real-world effortful tasks.

Beyond these concerns about generalizability, the methodological analysis of the current research identified several limitations that could influence result interpretation. First, the sample size and gender distribution may have constrained statistical power and the ability to detect nuanced effects. Second, pre-existing differences between groups present a fundamental validity concern: the experimental group demonstrated significantly higher persistence levels at pretest compared to the control group, potentially reflecting pre-existing factors that complicate exclusive attribution of improvements to the intervention. Third, the reliance on educator-completed questionnaires introduces subjectivity, as teachers' perceptions may not objectively capture children's actual behavior. Finally, the study did not account for potentially confounding variables such as competitiveness, intrinsic motivation, self-efficacy, or risk-taking propensity, any of which could moderate or mediate the observed effects. Collectively, these limitations underscore the need for methodologically rigorous designs with equivalent baseline groups, objective behavioral measures, and comprehensive assessment of individual difference variables to more definitively establish the causal impact of persistence interventions in early childhood.

Conclusions

This study set out to examine the effectiveness of a structured play intervention program in enhancing persistence among preschoolers, compare persistence development between experimental and control groups, and investigate the influence of individual factors such as gender and child-educator relationship quality on persistence levels. The findings partially supported the initial hypotheses, revealing a complex picture of intervention effects. The experimental group demonstrated significant improvements in overall persistence and its subdimensions—particularly cognitive persistence, motor persistence, and mastery enjoyment—when comparing their pretest to posttest scores. These improvements suggest that the intervention's focus on cooperative, non-competitive activities such as collaborative puzzle assembly, tower building with mutual support, and creative tasks without time constraints created conditions that engaged children in process-oriented learning experiences. The program's emphasis on teamwork, mastery orientation, and peer support appeared to foster environments where children could develop persistence through authentic task engagement rather than competitive pressure.

However, the interpretation of the results is complicated by pre-existing baseline differences between groups. The experimental group showed significantly higher persistence scores on all subscales at pretest compared to the control group, and although post-intervention differences became more pronounced, this pattern may reflect selection bias rather than genuine intervention effects. Research demonstrates

that comparing groups against their own baselines can produce misleading conclusions and that baseline values cannot adequately control for subsequent changes over time (Altman & Bland, 2011; Moser, 2019). The maintained differences at posttest could have occurred regardless of whether the activities were applied, aligning with broader evidence that many preschool interventions demonstrate fadeout patterns, with effects diminishing substantially after treatment completion (Bailey et al., 2020; Duncan & McKeachie, 2010). Regarding individual factors, neither gender nor child-educator relationship quality demonstrated statistically significant effects on persistence development. The absence of gender differences may reflect the study's deliberate use of non-competitive, cooperative tasks that measure persistence independently of competitive motivation—an important methodological consideration given that boys tend to be more competitive than girls from early ages (Sutter & Glätzle-Rützler, 2015; Sutter et al., 2016), and that persistence measures in competitive contexts can confound intrinsic task motivation with ego-involved competitive motives (Vansteenkiste & Deci, 2003).

Despite these methodological limitations, the study provides a foundation for understanding how structured play interventions might be applied in early childhood educational contexts. The tension between observed improvements within the experimental group and the challenges in attributing these changes solely to the intervention underscores the importance of both exploring practical applications and refining research methodologies. Moving forward, it is essential to consider both what these findings suggest for current educational practice and how future investigations can address the interpretive challenges identified in this study.

Practical Implications and Future Research Directions

The findings from this study offer valuable insights for both educational practice and future research directions. Understanding how structured play interventions may influence persistence development in early childhood has important implications for curriculum design, teacher professional development, and home-based learning environments. At the same time, the methodological challenges encountered in this study highlight important areas where future research can employ more rigorous designs to strengthen the evidence base for persistence-enhancing interventions in preschool settings.

The observed improvements in cognitive persistence and mastery enjoyment suggest that integrating educational games and activities that involve patience, concentration, and task completion may be valuable in early education settings. Such programs can serve dual purposes for both teachers and families. *For educators*, the study supports game-based methods as a foundation for developing robust teaching strategies that explicitly expose preschoolers to situations requiring task completion despite obstacles, integrating interactive activities and board games specifically chosen to help children manage failure, discover problem-solving strategies, and practice persistence in

supportive contexts. *For parents,* the findings highlight opportunities to integrate similar activities at home, as board games and cooperative tasks provide attractive ways to spend quality time with children while supporting persistence development. However, both educators and families should recognize that the causal relationship between such activities and persistence remains uncertain and that sustained developmental benefits may depend on continuous, systematic implementation rather than time-limited interventions.

To deepen understanding of the effects obtained from this intervention program, future research should address several important gaps. A longitudinal study evaluating the maintenance and transfer of persistence over extended time periods is essential, particularly one comparing intervention outcomes with and without direct educator involvement to clarify the role of the child-educator relationship in moderating persistence development. Future studies would benefit from employing gender-balanced samples, implementing external pretest/posttest evaluations conducted by trained assessors blind to group assignment to reduce potential bias from teacher ratings, and establishing rigorous randomized controlled designs with baseline equivalence between groups. Additionally, to strengthen the causal inference of persistence interventions, future research would benefit from randomized controlled designs, using objective behavioral measures, and systematically measuring and reporting implementation fidelity to confirm that the program is delivered exactly as designed.

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The relationship between adolescents' well-being and academic performance Systematic Review

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Abstract

Over the last decade, interest in student well-being has grown significantly across psychology, education, health and economics. This review highlights the importance of prioritising student well-being within education systems, recognising that both schools and policy makers play a crucial role in promoting it.This systematic review synthesises empirical studies on the association between well-being and academic performance in adolescents. Following PRISMA guidelines, we searched PubMed, PsycINFO, ERIC, Web of Science, Scopus, JSTOR, ScienceDirect, Google Scholar and ResearchGate between June and September 2023, using combinations of terms related to well-being, academic performance and adolescence. Inclusion criteria were: peer-reviewed articles published in English from 2010 onwards; samples with adolescents aged 10–19; quantitative designs; at least one indicator of well-being and one of academic performance; and analyses of the association between these constructs. Seventeen studies met the criteria, involving a total of 276,559 students from diverse cultural and educational contexts. Across studies, higher levels of well-being (e.g., life satisfaction, psychological, social and school well-being, engagement) were generally associated with better academic outcomes (grades, test scores, perceived academic competence). At the same time, some evidence pointed to trade-offs, whereby high academic pressure was linked to lower well-being despite good performance. Socio-emotional factors (e.g., self-efficacy, self-esteem, peer and teacher relationships) and contextual characteristics (e.g., school climate, socioeconomic status) emerged as important mediators and moderators. Overall, the findings suggest a positive association between adolescent well-being and academic performance, while also underscoring the risk of achievement-oriented climates that undermine students' mental health. The review identifies conceptual and methodological gaps, particularly the limited number of longitudinal studies and the scarcity of evidence from Eastern Europe, and highlights the need for educational policies that integrate academic and well-being aims.

Keywords: well-being, academic performance, adolescents

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1. Introduction

In recent years, the promotion of student well-being has become a central concern in educational research and policy. International organisations and national governments increasingly recognise that schools are not only places for cognitive development, but also crucial contexts for social, emotional and psychological growth. At the same time, academic performance remains a primary indicator of educational success for students, families and systems. Understanding how these two aims – well-being and academic achievement – are related in adolescence is therefore of both scientific and practical importance.

Adolescence is a particularly sensitive period, marked by rapid biological, cognitive and social changes, as well as increasing academic demands and transitions between school stages. During this period, many young people experience declines in well-being and increased stress, while expectations regarding performance, examinations and educational trajectories intensify. Existing evidence suggests that higher levels of well-being are associated with better school outcomes, but findings are not always consistent, and the mechanisms underlying this relationship remain insufficiently understood. Meta-analyses and large-scale studies have highlighted positive links between subjective well-being and achievement, yet also point to contextual and individual conditions under which this association may weaken or even reverse.

Moreover, previous reviews have often focused on broad age ranges, mixed school and university samples, or specific indicators of well-being and achievement. Less attention has been paid to adolescence as a distinct developmental stage, to the diversity of well-being constructs used in school-based research, and to potential mediating and moderating factors such as school climate, interpersonal relationships or socioeconomic status. Evidence from eastern european contexts, including romania, remains particularly scarce, despite important changes in education systems and growing concern about students' mental health.

The present systematic review addresses this gap by synthesising empirical research on the relationship between adolescents' well-being and their academic performance. We focus on studies that conceptualise well-being within contemporary positive psychology frameworks and that report quantitative indicators of achievement. Specifically, we aim to describe how well-being and academic performance are operationalised and measured in adolescent samples, to summarise the main patterns of association between these constructs, to identify key mediators, moderators and contextual influences, and to highlight methodological limitations and directions for future research, with particular attention to implications for educational practice and policy.

2. Definition of concepts

2.1 Well-being

Prior to the 2000s, the mental health sector was dominated by the medical model, which defined (mental) health by the absence of symptoms and dysfunction. By focusing on treating illness and reducing negative symptoms, this model neglected the positive aspects of human functioning. In 2000, Seligman and Csikszentmihalyi proposed a radical shift, promoting a more holistic mental health framework in which the promotion of mental health and positive functioning would take centre stage. The World Health Organization redefined mental health in 2005 as "a state of well-being in which an individual realizes his or her own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to his or her community". Thus, mental health was no longer seen only as the absence of illness, but also as a state of well-being and positive functioning (WHO, 2005, p. 5).

This paradigm shift led to the emergence of positive psychology, a science of well-being and positive emotions. The concept of well-being has become central to positive psychology, being defined as a multidimensional construct covering psychological, emotional and social aspects (Seligman, Csikszentmihaly, 2000). The literature has faced challenges in precisely defining well-being due to the complex and subjective nature of the concept. Although efforts have been made to formulate a clear definition, many approaches have focused on identifying and describing the dimensions associated with well-being (Seligman et al., 2009).

Well-being has been approached in two main traditions: hedonic and eudaimonic. The hedonic tradition focuses on happiness and positive affect, while the eudaimonic tradition emphasizes human development and positive psychological functioning (Dodge et al., 2012). The concept has been defined as a sustainable state that combines feeling good and optimal functioning, which includes experiencing positive emotions, personal development, control over life, and positive relationships (Ruggeri et al., 2020).

In the literature, the concept of well-being is approached in a range of dimensions, reflecting the complexity and diversity of human experience. These include:

- Psychological well-being, defined by Ryff and Singer (2006), which includes aspects such as purpose in life, personal growth and positive relationships.
- Social well-being, proposed by Keyes (1998), which refers to positive attitudes towards others and active participation in society.
- Emotional well-being, described by Diener (1984), which highlights the subjective experience of happiness, satisfaction and other positive and negative emotions.
- Subjective well-being, which is the individual's subjective evaluation of life and is associated with the level of perceived happiness and satisfaction (Diener, 1984).
- Material well-being, related to access to material resources and the economic aspects of an individual's well-being (Wilkinson & Pickett, 2009).

- Physical well-being, which is associated with an individual's state of health (Keyes, 2002).
- Spiritual well-being, which emphasises the deep connection to transcendental issues and the satisfaction derived from spiritual and religious experiences (Emmons, 2005).Environmental well-being, which focuses on the individual's relationship with the environment and issues of sustainability and ecological balance (Rapley, 2003).

These multiple and interconnected dimensions of well-being are fundamental to understanding and promoting a balanced and fulfilled life, reflecting the complexity and diversity of humanity.

In this review, we adopt an integrative perspective grounded mainly in eudaimonic conceptions of well-being, complemented by hedonic indicators. Eudaimonic approaches emphasise optimal functioning, purpose and personal growth, whereas hedonic approaches focus on positive affect and life satisfaction. Building on Seligman's model of authentic well-being and the PERMA framework, we consider five broad domains: Positive emotions, Engagement, Relationships, Meaning and Accomplishment. Within this lens, life satisfaction and affect capture hedonic aspects; psychological and social well-being reflect eudaimonic functioning; school engagement and burnout tap into the "Engagement" component; and academic grades and perceived competence are treated as indicators of "Accomplishment". The studies included in this review measure at least one of these domains, allowing us to interpret their findings within a coherent theoretical model.

2.2Academic performance

Within the education system, the school aims to achieve the main objective of learning and performance. Evaluation of the effectiveness of the learning process can be carried out at the level of the whole system and of individual pupils. School performance is the indicator of the level of theoretical and practical preparation of students, expressed by the ratio between the knowledge and skills acquired and the provisions of the school curriculum (Jude, 2002; Cucoș, 2008, cited in Curelaru, 2014). However, although school performance should also reflect other aspects of students' personality, it has been observed that there is a greater concentration on the evaluation of intellectual aspects, to the detriment of other capacities such as professional, moral, or aesthetic ones (Bontaș, 1998, cited in Curelaru, 2014). The ultimate goal of education is the formation of the skills needed to achieve performance. It is important to mention the relationship between school success and failure. School success refers to the achievement of an optimal school performance, expressed by high grades and the development of skills for practical, cultural or artistic activities. It can also be reflected in the higher qualities of the pupils' personality, such as intelligence, aptitude, or initiative. In contrast, failure means low academic achievement or insufficient personality development, including lack of motivation, maladjustment or behavioural deviations.

3. Theoretical models supporting the relationship between emotional well-being and academic performance

From an integrative positive psychology perspective, we conceptualise adolescent well-being as including both hedonic components (frequent positive affect, low negative affect, life satisfaction) and eudaimonic components (a sense of meaning, engagement, positive relationships and personal growth). This view is broadly consistent with Seligman's model of authentic well-being and the PERMA framework (Positive emotions, Engagement, Relationships, Meaning, Accomplishment; Seligman, 2011). In line with this conceptualisation, we included in the review empirical studies that assessed at least one hedonic or eudaimonic indicator of well-being (e.g., subjective well-being, life satisfaction, school engagement, flourishing, or burnout as an indicator of reduced well-being) and at least one indicator of academic motivation or performance (e.g., grades, GPA, standardised test scores, perceived academic competence, achievement goals).

The relationship between emotional well-being and academic performance can be understood through several complementary theoretical models. Barbara Fredrickson's broaden-and-build theory of positive emotions proposes that experiences such as joy, interest and gratitude broaden individuals' thought–action repertoires and, over time, build enduring personal resources (Fredrickson, 2001). In the school context, positive emotions may therefore widen students' attention, enhance cognitive flexibility and support more effective problem solving and learning.

Self-Determination Theory (SDT) further explains how learning environments that satisfy students' basic psychological needs for autonomy, competence and relatedness promote both well-being and high-quality academic motivation (Ryan & Deci, 2000). When students feel that they have some choice in their learning, perceive themselves as capable, and experience warm, supportive relationships with teachers and peers, they are more likely to internalise academic goals, to engage more deeply with schoolwork and to persist in the face of difficulties. These processes, in turn, can enhance academic performance. Positive psychology perspectives, including Seligman's theory of authentic well-being and Csikszentmihalyi's concept of flow, also highlight the role of strengths, engagement and meaning in supporting both well-being and achievement by sustaining focus and enjoyment in learning activities (Csikszentmihalyi, 1990; Seligman, 2011).

Conversely, models such as the accommodation erosion model, the academic incompetence model and the shared risk model emphasise how chronic stress, repeated failure or unsupportive environments can erode both well-being and performance over time (e.g., Deighton et al., 2018; Moilanen et al., 2010). Taken together, these frameworks suggest several potential causal pathways: well-being can facilitate learning through enhanced cognitive and motivational resources; academic success can contribute to well-being by reinforcing self-efficacy and a sense of accomplishment; and, under conditions of excessive pressure or poor support, high achievement may come at the cost of emotional health. These theoretical premises guided both our selection of studies and our interpretation of the empirical findings reviewed in this article.

4.Methodology

4.1 Objectives of the systematic review

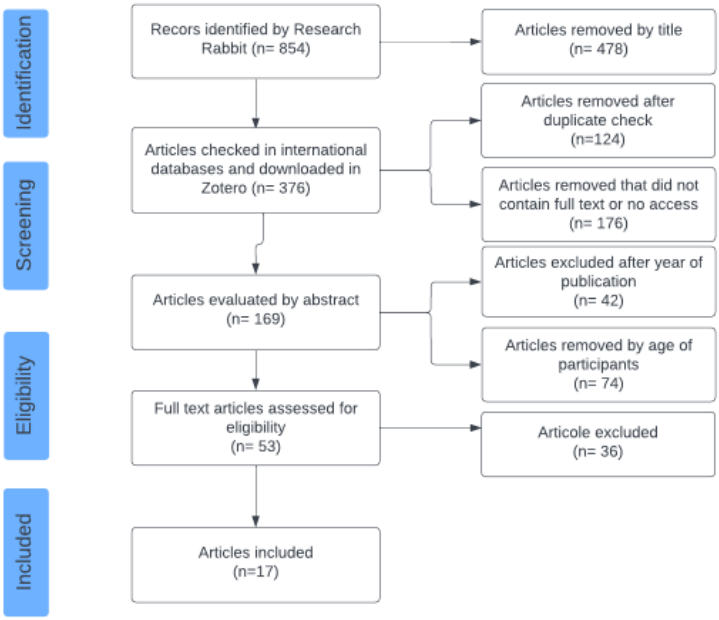
The present review pursues four interrelated objectives. First, it seeks to **identify and synthesise** empirical studies that investigate the association between well-being and academic performance in adolescents. Second, it aims to **describe how well-being and academic performance are conceptualised and measured**, including the main dimensions, instruments and indicators used across studies. Third, it aims to **examine factors that may mediate or moderate** the relationship between well-being and academic performance, such as age, gender, socioeconomic background, school climate and interpersonal relationships, as well as the statistical approaches used to model these associations. Finally, the review seeks to **assess methodological limitations and gaps in the literature**, and to **formulate recommendations for future research and educational practice**.

4.2 Study selection, inclusion criteria and search strategy

The study selection process for this systematic review was conducted between June and September 2023 and was reported in accordance with the PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) guidelines. The full study selection process, including the number of records identified, screened, excluded and retained at each stage, is presented in the PRISMA flow diagram (**Figure 1**).

Figure 1

PRISMA flow diagram of the study selection process.



The literature search was conducted in English, in accordance with PRISMA guidelines, and combined key terms related to well-being, academic performance and adolescence. A typical search string took the following form: ("well-being" OR "wellbeing" OR

"subjective well-being" OR "mental health") AND ("academic performance" OR "academic achievement" OR "school performance" OR "academic attainment") AND (adolescen* OR "secondary school" OR "high school" OR "middle school"). Initially, three core articles were identified through the Research Rabbit platform and used as a starting point to generate connection schemes and expand the search to related studies. The search strategy was then applied across several international databases, including PubMed, PsycINFO, ERIC, Web of Science, Scopus, JSTOR, Google Scholar, ScienceDirect and ResearchGate, and was complemented by screening the reference lists of relevant articles. The database search initially yielded 854 records. Using predefined inclusion and exclusion criteria, we retained empirical studies with quantitative designs conducted in school or school-related settings, focusing on adolescents aged 10–19 years enrolled in primary, lower- or upper-secondary education, and investigating the relationship between student well-being and academic performance by reporting at least one indicator of each construct (e.g., subjective, psychological, social, school or emotional well-being, engagement or burnout as reduced well-being; subject grades, grade point average, standardised test scores or perceived academic achievement or competence). Only peer-reviewed journal articles published from 2010 onwards, with full text available and conducted in European or non-European contexts, were considered, with particular interest in studies examining mediators or moderators of the well-being–achievement link. At the title-screening stage, 478 records that were clearly irrelevant to these criteria were excluded, and the remaining 376 articles were downloaded and imported into Zotero. After removing 207 duplicates and records with incomplete texts or without access to the full text, 169 studies remained. We then excluded 42 articles published before 2010 and 74 studies whose samples did not consist of adolescents, resulting in 53 articles that were assessed in full for eligibility. Of these, 36 were excluded because they did not analyse the relationship between well-being and academic performance in school contexts or did not otherwise meet the inclusion criteria (for example, studies conducted exclusively in clinical or community settings, studies focusing only on well-being or only on academic performance, theoretical or review papers, non–peer-reviewed publications, or records without full text). Finally, 17 studies met all criteria and were included in the review; together, they form the empirical basis of the present systematic review. The inclusion and exclusion criteria are summarised in Table 1.

Table 1

Inclusion and exclusion criteria for the systematic review

Domain	Inclusion criteria	Exclusion criteria
Population	Studies including adolescents aged **10–19 years**, enrolled in primary, lower- or upper-secondary education.	Samples consisting exclusively of children **younger than 10 years**, university students, adults, or mixed samples in which data for adolescents are not reported separately.
Setting / Context	Studies conducted in **school or school-related settings** (e.g., classroom, whole-school context).	Studies conducted **solely in clinical or community settings** unrelated to schooling.
Focus of the study	Studies that **investigate the relationship** between student well-being and academic performance.	Studies focusing **only on well-being** without any academic performance indicator, or **only on academic performance** without any well-being indicator
Well-being indicators	At least one quantitative indicator of student well-being, such as subjective, psychological, social, school or emotional well-being, engagement, or burnout as an indicator of reduced well-being.	No indicator of student well-being, or exclusive focus on psychopathology/mental illness without a positive well-being measure.
Academic performance indicators	At least one quantitative indicator of academic performance, such as subject grades, grade point average (GPA), standardised test scores, or perceived academic achievement/competence.	No indicator of academic performance reported.
Study design	Empirical studies with quantitative and mixed-method designs that reported quantitative indicators of both student well-being and academic performance and analysed the association between these constructs.	Theoretical or conceptual papers, literature reviews, commentaries, editorials, or empirical studies that did not provide quantitative indicators for both well-being and academic performance.
Publication characteristics	Peer-reviewed journal articles, written in English, published from 2010 onwards, with full text available.	Non–peer-reviewed sources (e.g., reports, theses, conference abstracts), articles published before 2010, non-English publications, or records for which the full text could not be obtained.

5.Data analysis and synthesis

5.1Overview of included studies

Analysis of studies conducted between 2011 and 2023 reveals a diverse perspective on the relationship between student well-being and academic success. The research covers a wide range of socio-cultural and educational contexts, including European countries such as Germany, Spain, Portugal, Romania, the United Kingdom and Finland, as well as non-European contexts such as Chile, Korea, the Philippines, Australia, the United States, Turkey and China. One large-scale study based on data from 35 OECD member countries provides a cross-cultural view of how schools influence both student well-being and academic performance at system level (Govorova et al., 2020). In total, the 17 studies included in the review involved 276,559 students (31,890 when the OECD study is excluded). Most samples focused on critical periods of educational transition, with participants aged between 9 and 19 years and an average age of approximately 14.7 years. For 15 of the 17 studies, gender distribution was reported; across these samples, girls represented 43.29% of participants, which strengthens the generalisability of the

findings across genders. Regarding research design, five studies adopted a longitudinal design (Kim & Jeong, 2016; Datu & King, 2018; Choi et al., 2019; Kiuru et al., 2020; Kleinkorres et al., 2020), allowing for examination of prospective or reciprocal associations over time, whereas the remaining 12 studies were cross-sectional, providing snapshots of the relationships at specific points in time. Taken together, these designs offer both breadth and some depth in understanding the dynamics between well-being, the school environment and academic performance during adolescence. The main demographic characteristics and study designs of the included studies are summarised in Table 2.

Table 2

Demographic data, types of studies included

Author(s)	Year	Country	N	Age (range; M)	% girls	Design
Berger et al.	2011	Chile	674	9–10 years	51.5	Cross-sectional
Rüppel et al.	2015	Germany	508	10–14 years (M = 12.51)	45.08	Cross-sectional
Kim & Jeong	2016	Korea	3,500	13–14 and 18–19 years	Not reported	Longitudinal
Lv et al.	2016	China	419	Grades 4–6 (M = 10.97)	44.39	Cross-sectional
Cadime et al.	2016	Portugal	489	M = 16.31 years	54.6	Cross-sectional
Datu & King	2018	Philippines	389	M = 13.40 years	20.74	Longitudinal
Sánchez-García et al.	2018	Spain	1,664	14–19 years (M = 16.12)	53.0	Cross-sectional
Steinmayr et al.	2018	Germany	767	14–15 years (M = 14.07)	47.09	Cross-sectional
Choi et al.	2019	Korea	4,705	8, 10 and 12 years	Not reported	Longitudinal
Murray-Harvey	2019	Australia	888	10–15 years (M = 12.85)	49.0	Cross-sectional
Kleinkorres et al.	2020	Germany	2,902–4,180	Grades 5–9 (M ≈ 10.75–12.77)	49.5–49.7	Longitudinal
Kiuru et al.	2020	Finland	848	Grades 6–7 (M = 12.3)	54.0	Longitudinal
Govorova et al.	2020	35 OECD countries	248,620	15 years	50.0	Cross-sectional
Erdem & Kaya	2021	Turkey	6,890	M = 15.82 years	49.6	Cross-sectional
Ling et al.	2022	China	1,353	16–17 years	53.0	Cross-sectional
Țepordei et al.	2023	Romania	650	9–12 years (M = 10.99)	54.3	Cross-sectional
Clarke et al.	2023	UK	607	14–15 years	38.4	Cross-sectional

5.2 Study objectives

Across the period 2011–2023, the reviewed studies pursued a set of converging objectives at both individual and contextual levels. Early contributions focused on the association between students' socio-emotional well-being, self-esteem, social integration and academic performance, as well as on the role of classroom social climate and social network characteristics (Berger et al., 2011; Rüppel et al., 2015). Subsequent studies examined how emotional well-being, conceptualised in terms of positive and negative affect, relates to academic achievement and how parent–school communication may moderate this relationship (Lv et al., 2016; Cadime et al., 2016). Other research

investigated the contribution of school climate, academic self-efficacy, interest and test anxiety to explaining interindividual differences in achievement and subjective well-being (Steinmayr et al., 2018).

More recent work broadened the scope of analysis to include difficulties in emotional and behavioural adjustment, supportive and stressful relationships, school membership and socio-emotional adjustment (Sánchez-García et al., 2018; Murray-Harvey, 2019). Several studies examined reciprocal relationships between different aspects of well-being (physical, cognitive, emotional) and academic performance, bringing into focus possible gender differences and school-type differences in these associations (Kleinkorres et al., 2020; Erdem & Kaya, 2021; Ling et al., 2022; Clarke et al., 2023). Others concentrated on the quality of adolescents' relationships with parents, teachers and school friends and the extent to which these relationships predict school well-being and, in turn, academic achievement (Kiuru et al., 2020; Țepordei et al., 2023). Large-scale studies estimated the magnitude of school effects on student well-being and performance across OECD countries, emphasising the importance of contextual influences (Govorova et al., 2020).

5.3. Dimensions and variables

The range of dimensions and variables examined reflects the conceptual richness of research on the well-being–achievement link. Several studies focused on **socio-emotional and psychological well-being**, self-esteem, school climate, social integration and the social network of the class, as well as academic performance assessed through grade point averages (Berger et al., 2011; Rüppel et al., 2015). Other investigations extended the focus to emotional well-being, parent–school communication and demographic variables, exploring how these factors jointly contribute to academic success (Lv et al., 2016).

Burnout and engagement were also key constructs in some studies, which analysed the interplay between emotional, psychological and social well-being, dedication, vigour, cynicism, exhaustion and academic performance (Cadime et al., 2016). Additional work examined school climate, interest, test anxiety, subjective well-being and achievement, highlighting multiple pathways through which classroom experiences and student dispositions can affect both well-being and outcomes (Steinmayr et al., 2018).

Other studies emphasised supportive and stressful relationships, psychological well-being, social/emotional adjustment and academic performance (Murray-Harvey, 2019), or focused on the reciprocal relationships between emotional, cognitive and physical well-being and achievement, considering also gender and school level (Kleinkorres et al., 2020). Life satisfaction, perceptions of academic performance, number of friends and peer acceptance were examined as indicators of social and academic adjustment, often alongside mindset and interpersonal relationships (Kiuru et al., 2020; Ling et al., 2022; Țepordei et al., 2023; Clarke et al., 2023). Overall, the similarities across studies lie in

their comprehensive approach to the complex relationship between well-being and academic performance, with attention to both individual and social influences.

5.4 Instruments

The studies employed a wide variety of instruments to assess well-being, contextual factors and academic performance. For instance, Berger et al. (2011) used the Socio-Emotional Well-Being Self-Report Scale and the Self-Esteem Test (TAE), together with school climate and social network measures, to examine the impact of emotional well-being and self-esteem on academic performance. Rüppel et al. (2015) used the KIDSCREEN-27 to assess psychological well-being and school climate, alongside grade point averages in German and mathematics and parental reports of socioeconomic status. Lv et al. (2016) relied on midterm and final exam grades in Chinese, mathematics and English, a questionnaire on parental involvement in children's education and an emotions scale assessing positive and negative affect. Cadime et al. (2016) used the Mental Health Continuum–Short Form for Youth, burnout and engagement scales and overall semester averages to examine associations between well-being, burnout, engagement and achievement. Sánchez-García et al. (2018) combined the Strengths and Difficulties Questionnaire, a positive and negative affect scale, a personal well-being index and an ad hoc academic performance questionnaire.

Other studies used school and classroom climate questionnaires, test anxiety inventories, subjective well-being scales, measures of supportive and stressful relationships, symptomology scales, school membership scales, friendship quality scales, teacher–student and parent–child relationship scales, and instruments assessing mindset, goal orientations and life satisfaction (Steinmayr et al., 2018; Murray-Harvey, 2019; Kiuru et al., 2020; Ling et al., 2022; Țepordei et al., 2023; Clarke et al., 2023). Academic performance was typically assessed through grade point averages, grades in core subjects or standardised tests, including PISA scales and national assessments (Govorova et al., 2020; Erdem & Kaya, 2021).

Thus, the research on the relationship between well-being and academic performance benefits from a wide range of instruments, from self-report measures of well-being and school climate to standardised assessments of academic performance. As a common feature, most studies measured academic achievement through grades in core subjects (e.g., mathematics, language, English, science) or PISA scores.

5.5 Statistical analysis

The statistical analyses used in the included studies reflect a variety of techniques aimed at capturing the complexity of the relationships between well-being, contextual factors and academic performance. Several studies used hierarchical linear models, linear regression and hierarchical multiple regression to explore the influence of emotional and psychological well-being, school climate and demographic variables on academic achievement (Berger et al., 2011; Rüppel et al., 2015; Lv et al., 2016; Cadime et al., 2016; Erdem & Kaya, 2021).

Multivariate techniques, such as multivariate analysis of covariance (MANCOVA) and structural equation modelling (SEM), were used to examine complex interdependencies and potential mediating effects (Sánchez-García et al., 2018; Steinmayr et al., 2018; Choi et al., 2019; Murray-Harvey, 2019; Govorova et al., 2020; Ling et al., 2022; Clarke et al., 2023). Longitudinal studies often used cross-lagged models or other longitudinal SEM approaches to assess reciprocal relationships between well-being and academic performance over time (Kim & Jeong, 2016; Datu & King, 2018; Kiuru et al., 2020; Kleinkorres et al., 2020).

In addition, basic techniques such as t-tests and Pearson correlations were employed to assess group differences and bivariate associations (Cadime et al., 2016; Erdem & Kaya, 2021). Overall, the use of diverse analytic strategies indicates a growing effort to move beyond simple correlations and to capture the multifaceted nature of the well-being–achievement link.

The main objectives, dimensions, instruments and statistical analyses of the included studies are summarised in Table 3.

Table 3

Objectives, dimensions, instruments and statistical analyses

Author(s)	Year	Main objective	Key variables	Instruments	Main analyses
Berger et al.	2011	To examine the association between well-being and academic performance, taking into account individual-level and class-level characteristics.	Socio-emotional well-being; self-esteem; school climate; social integration; class social network; academic performance	Socio-Emotional Well-Being Self-Report Scale; TAE Self-Esteem Test; ECLIS School Climate Scale; Social Cognitive Mapping (SCM); SIENA; GPA (previous year)	Hierarchical linear modelling (HLM)
Rüppel et al.	2015	To examine correlations between students' self-reported well-being and academic performance, considering SES.	Psychological well-being; school climate; academic performance; socioeconomic status	KIDSCREEN-27; GPA in German and Mathematics; parent-reported education and income	t-tests; linear regression
Lv et al.	2016	To analyse the relationship between academic achievement and emotional well-being and the moderating effect of parent–school communication.	Academic performance; parent–school communication; emotional well-being; demographic variables	Exam grades in Chinese, Mathematics and English; parental involvement questionnaire; Emotions Scale (positive and negative affect)	Hierarchical multiple regression
Cadime et al.	2016	To examine the relationships between burnout and engagement, well-being and academic performance.	Academic performance; emotional well-being; psychological well-being; social well-being; dedication; vigour; cynicism; exhaustion	Semester GPA; Mental Health Continuum–Short Form for Youth; MBI-SS Burnout Inventory; UWES-S Engagement Scale	t-tests; Pearson correlations; hierarchical linear modelling
Sánchez-García et al.	2018	To examine behavioural and emotional difficulties and their relationships with subjective well-being, affect and academic performance.	Emotional and behavioural difficulties; emotional well-being; positive and negative affect; academic performance	Strengths and Difficulties Questionnaire (SDQ); PANAS-C; Personal Well-Being Index–School (PWI-SC); ad hoc Academic Performance Questionnaire; Oviedo Response Infrequency Scale (INF-OV)	Multivariate analysis of covariance (MANCOVA)
Steinmayr et al.	2018	To test the validity of school climate, academic self-	School climate; academic self-efficacy; interest; test	School and Classroom Climate Questionnaire	Structural equation

		efficacy, interest and test anxiety as predictors of academic achievement and subjective well-being.	anxiety; subjective well-being; academic performance	(LFSK); self-regulation questionnaire (self-efficacy subscale); Test Anxiety Inventory (TAI-G); Subjective Well-Being Scale (HSWBS); GPA	modelling (SEM)
Murray-Harvey	2019	To investigate associations between supportive and stressful relationships, social/emotional adjustment, psychological well-being and academic performance.	Supportive relationships; stressful relationships; psychological well-being; social/emotional adjustment; academic performance	Family, peer and teacher support scales; symptomatology scale (apathy, somatic symptoms, depression, aggression); school membership scale; teacher rating scales	Correlations; partial least squares path analysis (PLS-PATH)
Kleinkorres et al.	2020	To examine reciprocal relationships between physical, cognitive and emotional well-being and academic achievement, and gender and school-type differences.	Academic performance; physical well-being; cognitive well-being; emotional well-being; gender; school track	NEPS tests (reading, mathematics); self-reported health and absenteeism; satisfaction scale; helplessness scale	ANOVA; t-tests; Bonferroni–Holm post hoc tests
Kiuru et al.	2020	To examine reciprocal relationships between adolescents' relationships with parents, friends and teachers, school well-being and academic achievement.	Academic performance; school well-being; quality of relationships with teachers, friends, parents	GPA; Friendship Qualities Scale; Student–Teacher Relationship Scale (STRS); Parent–Child Relationship Scale (CPRS)	Cross-lagged structural equation models
Govorova et al.	2020	To identify components of well-being that predict academic performance and estimate school effects on well-being in OECD countries.	Psychological well-being; physical well-being; school climate; academic performance; socioeconomic status	PISA performance scales; background questionnaire; ESCS index; science grades	Confirmatory factor analysis (CFA); structural equation modelling (SEM)
Erdem & Kaya	2021	To examine correlations between demographic characteristics, SES, well-being and academic achievement.	Academic performance; psychological well-being; subjective well-being; social well-being; age; gender; SES	PISA 2018 test scores and background indicators (well-being, SES, etc.)	Pearson correlations; hierarchical multiple linear regression
Ling et al.	2022	To investigate student well-being and the balance between well-being and academic performance.	Academic well-being; psychological well-being; personal well-being; physical well-being; spiritual well-being; academic performance	Self-Descriptive Questionnaire II; PERMA-based psychological well-being items; Life Resilience Scale; Self-Descriptive Questionnaire III; Vitality Scale; relationship scale; SHALOM-2; grades in Chinese, Mathematics and English	Exploratory and confirmatory factor analyses (EFA, CFA); cross-validation
Țepordei et al.	2023	To examine interactions between peer relationships, life satisfaction and academic performance, considering perceived academic competence as a mediator.	Life satisfaction; perceived academic performance; academic performance; number of friends; peer acceptance; perceived academic competence	BMSLSS; Self-Perception Profile for Children; grades in English and Mathematics; sociometric items; peer hierarchy	Structural path modelling
Clarke et al.	2023	To examine the relationship between mindset, well-being and academic achievement in adolescence.	Mindset; well-being (eudaimonia, life satisfaction); academic performance; interpersonal relationships; goal orientations	"How I feel about myself and school" scale; TIS Implicit Theories of Intelligence Scale; Self-Theory Scale; PALS achievement goal orientations; GPA in Mathematics and English	Structural equation modelling (SEM)

5.6 Main patterns of association between well-being and academic performance

Taken together, the studies provide converging evidence for a predominantly **positive association** between adolescent well-being and academic performance. Higher levels of subjective, psychological and school well-being, as well as greater engagement and life satisfaction, were generally associated with higher grades, better test scores and more positive perceptions of academic competence (Berger et al., 2011; Cadime et al., 2016; Sánchez-García et al., 2018; Steinmayr et al., 2018; Govorova et al., 2020; Erdem & Kaya, 2021; Ling et al., 2022; Țepordei et al., 2023; Clarke et al., 2023). These findings suggest that students who feel satisfied with their lives, experience positive emotions and perceive their school environments as supportive tend to achieve more favourable academic results.

At the same time, several studies highlight **possible trade-offs under conditions of high academic pressure**. In some highly competitive contexts, strong academic performance coexisted with lower levels of emotional or school-related well-being, suggesting that achievement can sometimes be maintained at the cost of elevated stress, reduced life satisfaction or symptoms of burnout (Govorova et al., 2020; Erdem & Kaya, 2021; Ling et al., 2022). Such paradoxical patterns underline the fact that the well-being–achievement link is not uniformly positive and may depend on how academic demands, expectations and support are balanced at school and system levels.

A second consistent theme concerns the role of **psychological and socio-emotional resources**. Self-esteem, self-efficacy, perceived academic competence, emotional adjustment and socio-emotional skills were repeatedly associated with both well-being and academic performance (Cadime et al., 2016; Sánchez-García et al., 2018; Murray-Harvey, 2019; Kiuru et al., 2020; Ling et al., 2022; Țepordei et al., 2023; Clarke et al., 2023). Adolescents who felt confident in their abilities, showed adaptive coping and reported fewer emotional and behavioural difficulties tended to display higher levels of well-being and stronger academic outcomes, whereas emotional and behavioural problems were linked to lower well-being and poorer performance (Sánchez-García et al., 2018; Murray-Harvey, 2019; Erdem & Kaya, 2021).

A third theme involves **relational and contextual influences**. Positive and supportive relationships with parents, teachers and peers, as well as perceptions of a fair, caring and inclusive school climate, were generally associated with higher levels of well-being and better academic achievement (Berger et al., 2011; Murray-Harvey, 2019; Kiuru et al., 2020; Govorova et al., 2020; Țepordei et al., 2023; Clarke et al., 2023). Social support and high-quality teacher–student relationships often acted as protective factors, buffering the negative impact of academic stress on both well-being and performance (Murray-Harvey, 2019; Kiuru et al., 2020; Țepordei et al., 2023), whereas experiences of bullying, social exclusion or conflict were associated with reduced well-being and weaker academic outcomes (Erdem & Kaya, 2021; Țepordei et al., 2023). Differences related to gender, socioeconomic status and school type were also observed, indicating that the strength and direction of the well-being–achievement association can vary across student

groups and educational contexts (Kleinkorres et al., 2020; Erdem & Kaya, 2021; Ling et al., 2022; Clarke et al., 2023).

Overall, the evidence suggests that the relationship between well-being and academic performance in adolescence is shaped by a **broader network of individual, relational and contextual factors**, rather than constituting a simple, linear association.

5.7 Methodological and conceptual limitations of the included studies

The analysis of the 17 studies also brings to light several methodological and conceptual limitations that should be considered when interpreting the findings. Some studies relied solely on teacher-assigned grades as indicators of academic performance, without complementing them with external examinations or standardised tests, which may affect comparability across contexts and the robustness of conclusions. In other cases, the absence of specific groups in the sample or the focus on a single region, school type or country limits the generalisability of the results.

Many studies were based primarily on self-report measures of well-being and related constructs, which, while valuable, are vulnerable to social desirability and response biases. In some cases, potentially important confounding variables were not fully controlled, making it difficult to determine whether the observed associations can be attributed to well-being and contextual factors or to unmeasured influences.

Furthermore, a substantial proportion of the studies used cross-sectional designs, which preclude strong causal inferences and do not allow for examination of temporal ordering or reciprocal influences. Although several longitudinal studies were included, they remain relatively few and often limited to specific age ranges or time spans. Finally, conceptual heterogeneity in the operationalisation of well-being and academic performance complicates direct comparisons and the formulation of cumulative conclusions.

These limitations highlight the need for future research to employ more diverse and representative samples, multi-informant data (students, teachers, parents), rigorous longitudinal and intervention designs, and clearer, theoretically grounded conceptualisations of both well-being and academic performance.

6.Discussions

6.1 Interpretation of results in light of theoretical frameworks

The findings of this review indicate that adolescent well-being and academic performance are closely related, yet in ways that are nuanced and context-dependent. The predominantly positive associations between various dimensions of well-being (subjective, psychological, social and school well-being, engagement, life satisfaction) and academic outcomes are consistent with broaden-and-build theory, which posits that positive emotions broaden individuals' thought–action repertoires and build durable cognitive, social and psychological resources. In school settings, students who experience

more frequent positive emotions may show greater curiosity, persistence and openness to learning, which in turn can enhance their academic performance.

The results also align with Self-Determination Theory, which emphasises the role of basic psychological needs—autonomy, competence and relatedness—in fostering well-being and high-quality motivation. Studies in which students perceived their learning environments as supportive and fair, and their relationships with teachers and peers as positive, tended to report higher levels of well-being and better academic outcomes. This suggests that need-supportive school environments not only contribute to students' well-being but also promote internalised, autonomous forms of motivation that support sustained engagement and achievement.

At the same time, findings from highly competitive educational contexts, where excellent performance coexisted with low well-being, evoke theoretical models that highlight the costs of achievement under chronic stress. From this perspective, academic success driven primarily by external pressures, fear of failure or excessive workload may undermine emotional health over time, even if short-term performance indicators remain high. These patterns point to potential bidirectional and sometimes conflicting pathways: well-being can foster learning and performance through enhanced cognitive and motivational resources, but prolonged academic pressure and negative feedback can erode well-being and eventually weaken academic functioning.

The reviewed studies also underscore the importance of mediating and moderating mechanisms. Psychological resources such as self-efficacy, self-esteem and perceived academic competence appear to mediate the link between global well-being and academic outcomes, shaping how students interpret challenges and mobilise effort. Relational variables and school climate function as moderators, influencing the extent to which academic demands translate into stress or growth. Supportive relationships with parents, teachers and peers, as well as inclusive and participatory school environments, can buffer the negative effects of stress, whereas experiences of bullying, exclusion or perceived unfairness may amplify them. These patterns are compatible with integrative positive psychology frameworks such as PERMA, which conceptualise Positive emotions, Engagement, Relationships, Meaning and Accomplishment as interrelated aspects of optimal functioning.

Overall, the findings suggest that promoting well-being in adolescence is not in opposition to academic excellence; rather, under favourable conditions, the two can be mutually reinforcing. The challenge for educational systems is to design environments in which high expectations are combined with strong relational support, meaningful learning experiences and opportunities for autonomy.

6.2Limitations of the present review

The present systematic review has several limitations that should be noted. First, the number of included studies (N = 17) is relatively modest, which may limit the comprehensiveness and generalisability of the conclusions. Second, the literature search,

although conducted in multiple major databases and complemented by citation tracking, was restricted to articles written in English and published from 2010 onwards; relevant studies published in other languages or earlier may have been missed.

Third, the study selection, data extraction and synthesis were carried out by a single researcher. Although predefined criteria and transparent procedures were used, the absence of independent screening and coding may introduce subjectivity and selection bias. Fourth, given the heterogeneity of study designs, measures of well-being and academic performance, and analytic strategies, a meta-analytic synthesis was not feasible; instead, we relied on narrative synthesis, which is inherently more interpretative.

These limitations suggest that the findings should be interpreted with caution and highlight the need for future systematic reviews that include broader language coverage, larger sets of studies and, where possible, quantitative synthesis.

6.3Future research directions and implications for the Romanian context

The reviewed evidence indicates that student well-being is closely linked to academic success, yet research on this relationship remains limited in some contexts, including Romania. National and international reports suggest that Romanian pupils show relatively high levels of subjective well-being in childhood, followed by notable declines during adolescence, in parallel with persistent challenges such as overloaded curricula, teacher shortages, low salaries in education and absenteeism.

In recent years, international projects (e.g., ENABLE, Schools for Health in Europe, Mindfulness in Schools) and national initiatives have begun to draw attention to the importance of well-being in Romanian schools. Studies conducted by the Ministry of Health and the National Institute of Public Health have emphasised the central role of teachers in creating inclusive, supportive classroom climates. However, systematic, large-scale research specifically targeting the relationship between well-being and academic performance among Romanian adolescents is still scarce.

To address this gap, future research should focus on context-sensitive investigations that consider the specific features of local education systems. In our own work, we intend to initiate studies in the Moldova region, focusing on lower- and upper-secondary school students, with the aim of examining how different dimensions of well-being (e.g., life satisfaction, school engagement, social relationships) relate to academic outcomes. Such research should also explore the roles of peer and teacher relationships, school climate and socio-emotional factors as potential mediators and moderators. By generating robust, context-specific evidence, these studies could provide a stronger basis for designing educational policies and interventions in Romania that jointly support well-being and academic success.

7. Conclusions

The synthesis of 17 studies examining the relationship between adolescent well-being and academic performance reveals a complex, but generally positive, association between these two domains. Higher levels of subjective, psychological and school well-being, as well as stronger engagement and life satisfaction, are typically linked to better academic outcomes. At the same time, findings from highly competitive or high-pressure contexts show that academic success can sometimes be achieved at the expense of emotional health, indicating that the relationship is not uniformly beneficial and depends on the broader educational environment.

The main contribution of this review lies in integrating heterogeneous conceptualisations and measures of well-being and academic performance within a coherent theoretical framework inspired by positive psychology, broaden-and-build theory, Self-Determination Theory and the PERMA model. By highlighting the roles of psychological resources, socio-emotional adjustment, relationships with parents, teachers and peers and school climate as mediators and moderators, the review moves beyond simple correlational descriptions and points to specific pathways through which well-being and academic performance can reinforce one another or come into tension.

For educational policy and practice, the findings suggest that promoting adolescent well-being is not a secondary objective, but a key condition for sustainable academic achievement. Educational strategies that foster positive emotions, engagement, supportive relationships, a sense of meaning and realistic accomplishment are likely to benefit both well-being and learning, especially when combined with fair, inclusive and autonomy-supportive school environments. Future research, particularly in under-studied contexts such as Eastern Europe, should prioritise longitudinal and intervention designs and multi-informant data in order to test causal mechanisms and to inform evidence-based policies that support the holistic development of young people.

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