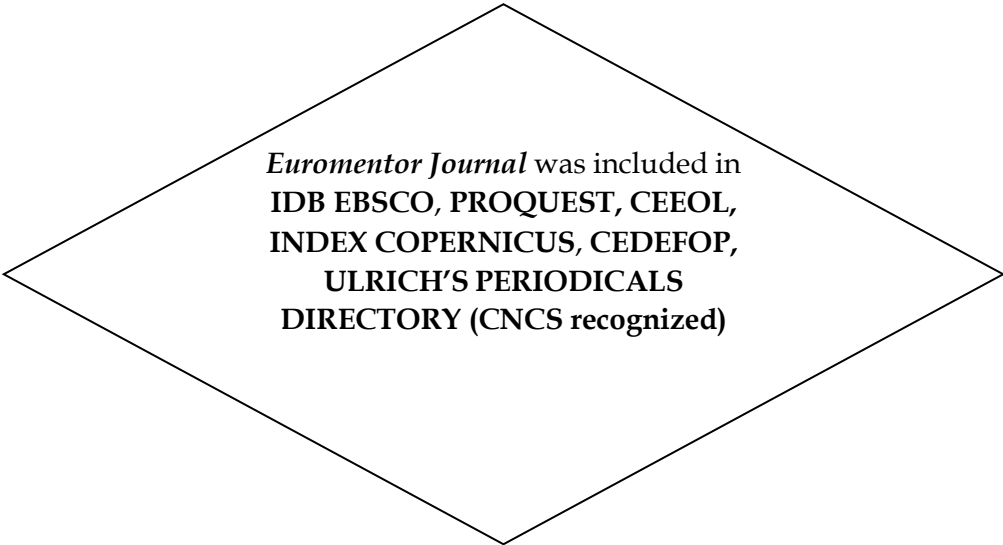


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# EDUCATING THE TEACHERS EXPRESSED IN PARADIGMS

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**Abstract:** Throughout the time, various thinking currents have been developed and they have strongly impacted the teachers' formation, the school practice as well as the conceptualising of the educational notions and domains. In time, both the practices and the theories which founded them have coexisted, though, as time went by, some of them have been losing consistency. We could even be discussing about "trends" in professionalising both the teaching career and the education. There certainly are several thinking currents, many paradigms which have generated "educational models"; we will be concentrating on three paradigms which have been profoundly impacting the Romanian education over the past half a century. It's about the paradigm of "pragmatic intuition", the paradigm of "pedagogy through objectives" and the paradigm of the "pedagogy of competences".

**Keywords:** professionalising the teaching career, educational trends, educational paradigms, the pedagogy of educational objectives, the pedagogy of competences.

## 1. Teachers' formation in Europe

### 1.1. General Context

Traditionally, in order to become a teacher in Europe one needs to obtain a teaching qualification. In some countries, successfully finalising the initial formation is the only condition to enter the recruitment process for the teaching profession. In other countries, the transition from the initial formation to the professional life includes supplementary steps to be taken by the alumni of the initial formation in order to be recruited as fully qualified teachers.

The way teachers are selected and recruited can not only have an impact on the quality of workforce in education, but it can also influence the request and offer of teachers. The teachers' recruitment and selection in Europe oscillates between a high degree of control from a central level to more flexible practices, decentralised. In some educational systems alternative routes for teaching qualifications are being offered.

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In some countries, graduating the initial formation is the only request to become fully qualified. In other systems, graduating the initial formation is not enough, as the alumni need to meet supplementary criteria. In France, besides finalising the initial formation, succeeding in a contest is required, after finalising the initial formation (after the two-year teaching master's degree), which, according to the new law issued in 2019, is to be held at the end of the second year of the teaching master's degree. In France, as well as in Spain, Italy, Luxemburg, Albania, Turkey, teachers need to go through a contest in order to obtain the full qualification. The contest focuses on evaluating the specialty knowledge and the professional competences, undergoing several stages. Succeeding in this contest provides both full qualification and the access to a permanent teaching position.

### *1.2. A few tendencies*

- Institutionalisation of formation and that of a teaching profession,
- Professionalising the teaching career,
- University at the initial formation of teachers,
- The need of a very tight link between the university and the preuniversity,
  - The need of coordinating the efforts of all the educational partners
  - In order to recruit the best teachers and to determine them to stay in the educational system, the valorisation of the teaching profession is needed,
    - In the formation process, the associate teachers/mentors play an out most significant role,
    - The pedagogical practice is the key to success in the teaching profession; “the job” of a teacher is to be learnt by teaching and practicing teaching.

### **2. “The teaching profession” adrift**

“Teacher's job is a great and beautiful profession, unlike any other, a job that is not left in the evening, along with the work clothes. A tough and pleasant job, humble and proud, demanding and free, a job in which mediocrity is not allowed, where exceptional training is barely satisfactory, a job that exhausts and invigorates, thankless and full of charm” (Victor Hugo).

Though, what lies beyond these words full of realism and wisdom? What (more) does the teaching profession represent today? Teachers face

realities that were once unthinkable in the school space. The school is increasingly vulnerable. "Everywhere the job of a teacher is becoming more difficult, more stressful, losing prestige and already in recent years there have been difficulties in recruiting future teachers" (*Traité des sciences et des pratiques de l'éducation*, coord. Jacky Beillerot et Nicole Mosconi, DUNOD, Paris, 2014, pag. 74)<sup>1</sup>. On the other hand, "The teaching profession is the most difficult in the world: the teacher is asked to be a judge and a trainer at the same time; though he has only one head, he is required to wear two hats at the same time!" (Vecchi, G., Hachette. (2014), *Éducation. Évaluer sans dévaluer*. Paris: CEDEX, Introduction)<sup>2</sup>.

The range of the main roles of the teaching staff has diversified; we consider Planning, Organizing, Communication, Leadership, Coordination, Guidance, Motivation, Counseling, Control, Evaluation activities.

Nowadays, we frequently talk about the professionalization of the teaching career. The model of the professionalization of teaching staff in Romania for the last four to five decades (initial training, final training and degrees) is outdated, tributary to some ideas and mentalities that betray an ankylosing in conception, in language, in techniques and practices; some exams or contests intended for teaching staff, some educational plans, subject programs, the teaching and evaluation system of students preparing for the teaching profession, the legal framework that manages it - are outdated; in addition this model is the "target" of partisan political disputes, the decision-makers are "scared" and do not dare to adopt firm/radical solutions to face the need for change. MEN Order no. 5087/August 31, 2016 regarding finalization in education only confirms our statements above. Through this Order, "Pedagogy" was removed from the structure of the final exam. More recently, the Draft Education Laws also remove the "Pedagogy" discipline from the structure of the exam for obtaining the II degree. How much is premeditation, how much is incompetence/ignorance in the construction of a concept, a vision regarding the future of Romanian education?

### **3. Professionalism, craftsmanship and dilettantism in Romanian school practice**

In the last seven to eight decades, the initial and continuous training of teachers in Romania but also in other countries has been deeply marked

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<sup>1</sup> Jacky Beillerot et Nicole Mosconi, DUNOD, *Traité des sciences et des pratiques de l'éducation*, coord., Paris, 2014.

<sup>2</sup> Vecchi, G., Hachette, *Éducation. Évaluer sans dévaluer*. Paris, 2014, CEDEX.

by several "models of education and training" generated by various currents of thought. There are certainly many currents of thought, many paradigms, but certainly three of them have deeply marked and still mark Romanian education. It is about the "pragmatic intuition paradigm", the "Pedagogy by Objectives" paradigm and the "Competence Pedagogy" paradigm.

These paradigms have a major impact on the educational styles of teachers easily identified in school classroom practice.

The paradigm of pragmatic intuition or the "DIY technique" is the basis of the didactic activity of the majority of teaching staff. Referring to teachers' practices, Ph. Perrenoud talks about "bricolage", this designating "the art of an artisan practitioner to use a series of practices, techniques, put to work to respond to the demands of a given context". From such a perspective/understanding of the didactic act, teaching, learning and assessment are an intuitive approach. "The craftsman/teacher in this case does not feel the need to precisely define his objectives, nor to establish his reference universe of learning situations, nor the criteria according to which he will make the assessment, nor the requirement to synthesize the available information, nor how will interpret the results, nor how will they capitalize...Though, the didactic activity is an act very closely related to concrete students and concrete contexts". (Ph. Perrenoud, in *Évaluer sans dévaluer*, coord. Gerard De Vecchi, Hachette Education, 2014 Paris, CEDEX 15, page 46)<sup>3</sup>.

The Paradigm of Pedagogy by Objectives (PPO) or the PPO Model is the basis of the teaching/learning/evaluation strategy promoted by teachers in Romanian education. Pedagogy by Objectives (PPO), undoubtedly associated with Benjamin Bloom's "Taxonomy of Educational Objectives" (1956), with Mager's implacable "Operationalization Technique of Educational Objectives", began to promote and has promoted a new optic; together with Pedagogy by Objectives, a new vision was born that replaced the classic normative approach that sought to compare students with each other with the criterion approach. According to the new concept, the student should no longer be compared to others (as in the case of normative evaluation), but should be compared to himself, on his way to achieving educational goals (*Traité des sciences*

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<sup>3</sup> Vecchi, G., Hachette, *Éducation. Évaluer sans dévaluer*. Paris : 2014, CEDEX.

et des pratiques de l'éducation, coord. Jacky Beillerot et Nicole Mosconi, DUNOD, Paris, 2014, Page. 407)<sup>4</sup>.

The Competency Pedagogy paradigm, ubiquitous today, has led to new approaches to teacher education and training, both in the initial and continuing stages. Competences are brought forward, at the present time, in Europe and in the world. Everyone agrees, but in private, many teachers refuse them. Nevertheless, we all agree that not only knowledge is important, more important is its application (*Evaluer sans dévaluer*, coord. Gerard De Vecchi, Hachette Education, 2014 Paris, CEDEX 15 page. 23)<sup>5</sup>.

Competence pedagogy is the successor of PPO (Pedagogy by Objectives). The significance of the enthusiastic adoption of competence-centered education could be summarized synthetically as follows: "turning towards success"! (idem, page 24). The strong ideas of political support for skills-based education and training have not been slow to appear: many young people leave the school system without qualifications, statistical studies show that many young people are headed for unemployment, so an education reform must guarantee the most solid foundations. And skills pedagogy guarantees that students will prove they can do something with what they've learned!

### **Conclusions**

Vocabulary changes, practices remain! This is how we could summarize, in our opinion, what happens, in general, in the training of teaching staff and in school practice in the Romanian education. The initial and continuous training of teaching staff in Romania is no exception to the reality represented by the three paradigms. We meet an interesting mixture of the three paradigms of the training process, in the styles of the teaching staff, which ensures Romanian education a certain specificity; it combines tradition with modernity, old with new, science with art, craftsmanship with modernist and postmodernist ideas in the field of education.

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<sup>4</sup> Jacky Beillerot et Nicole Mosconi, DUNOD, (). *Traité des sciences et des pratiques de l'éducation*, coord., Paris, 2014.

<sup>5</sup> Vecchi, G., Hachette, Éducation. *Évaluer sans dévaluer.*, Paris: 2014, CEDEX.

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# EDUCATION IN ROMANIA, BETWEEN POLITICS AND POLITICIES

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**Abstract:** "Education is everything you see and hear" said Nicolae Iorga. We regard education as a strategic development factor since an economy cannot be competitive unless its workforce is well-trained. On the other hand, education is what differentiates us as individuals, as peoples. The topic of the current research is based on the analysis of educational policies developed in Romania during the transition and post-transition period. Public policies are not identified with politics, even if they are related to the political system. The political interference in education has generated the fragmentation of the reform, legislative instability, the incoherence of educational policies. The consequences of this undesirable interference are reflected, today, in the paideutic deadlock in which the Romanian school finds itself. Starting from this reality, we appreciate that a rethinking of educational policies is required, aimed at a new axiological education, a "re-evaluation of all values" in the context of Europeanization and globalization.

**Keywords:** education, politics, public policies, educational policies, Romanian school.

## 1. Education is our chance!

An older political wisdom argues that long-term solutions to the crises man faces lie in the common citizen's education and training. From this point of view, a nation's education and culture are the best guard against all the crises and dangers that threaten it. A nation's education is the highest mission of a state. This truth, which represents one of the basic values of European wisdom, was quite clearly expressed even by Aristotle, in *Politics*<sup>1</sup>, where he wrote that "wherever education was neglected,

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<sup>1</sup> Aristotle, *Politics*, Bucharest, Iri Publishing House, 2001.

*the state received the most fatal coup because of this*". Some European nations and peoples have rediscovered this truth and taken it into account, others have not - everything depending on the degree of development of the national conscience. In this sense, the great modern British thinker Jh.S. Mill wrote: "A state that prefers greater administrative skill to the expansion and spiritual elevation of individuals, a state that diminishes its people will notice that great things cannot be achieved with small people."<sup>2</sup>

While the developed countries have reached a society based on "lifelong learning", that is the society in which the citizen is included in a system of learning and education throughout his life, from birth to death, we are wandering in the windings of a school reform that leads nowhere. In today's Romanian society, there is a need for a "metanoia", a mental mutation through which the collective mind may understand and see that the citizen's education and training lie at the basis of all other activities, be they economic, social, cultural, religious, military, social justice or public health. We can refer to "the convergence between *politics* and *pedagogy* or between *politeia* and *paideia*".<sup>3</sup> This convergence can be objectified in education, in social actions and, above all, in an educative matrix that may ensure an influx of healthy and autonomous people. This could generate a healthy and autonomous social body, thus implying much lower costs for the qualification of the labor force, for social assistance, for public health, for national protection and security. From this perspective, a wise social pedagogy is a *wise social policy* and, in its turn, a *wise social policy* is a "*wise social pedagogy*". This fundamental truth that we once also admitted represents the weak turning point of the Romanian politics.<sup>4</sup> The Romanian state's distance from school was one of the major mistakes of the communist policies, a mistake that tends to perpetuate itself. We can see that even today, 30 years after the fall of the old regime, the mentality has not changed as education is still regarded as a non-productive sector, and therefore it does not represent a national priority. The leaders of today's Romanian educational system should research and learn from the Haretian success of educational reforms due precisely to the fact that Spiru

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<sup>2</sup> Jh. S. Mill, *On Freedom*, Bucharest, Humanitas Publishing House, 2005.

<sup>3</sup> Nic. Sacaliş-Calata, *The Return of the Gods - Power, Democracy and Education*, Iaşi, The European Institute, 2011, p. 426.

<sup>4</sup> Ibidem.

Haret<sup>5</sup> made school policy a national priority and understood that any serious and long-lasting school reform began with the teacher. What happened in the Romanian space during the previous weeks, when hundreds of thousands of teaching staff, from all over the country, went out in the streets to call for their rights, on a large-scale strike, shows the precarious situation in which Romanian education finds itself and the unprecedented paideutic deadlock in which our country is.

## 2. Policy and policy makers

The theme proposed and presented in the Plenary of the International Conference of the DFP, "*Investment in Education, Investment in the Future*" held at the UEB in Bucharest, on April 7 this year, is based on the analysis of educational policies developed in Romania during the transition and post-transition period. For more than three decades, every Minister of Education, out of more than thirty who have been in governments of every political color, has been concerned, somehow, to leave their mark on the field of education, but unfortunately, most of the time, in an undesirable manner. The small reform that one had started was completely destroyed by the one who followed him. The politics was every time the architect of the disaster in the system. It is true that education has been a matter of state policy since Plato and Aristotle<sup>6</sup>. The only problem is that in Romania there has always been a tendency to mistake politics for policies. Or, politics does not determine policies, but vice versa (Lowi).<sup>7</sup> Today, everywhere in the world, the state means the cooperation of public policies. But regardless of the field, and especially in education, public policies do not identify themselves with politics, nor with its negative connotations. They have a mostly technical character and are means by which the state intervenes in social life to solve far-reaching public problems, to address social reality in a certain direction.<sup>8</sup> There is a diversity of points of view regarding the content of educational policies in

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<sup>5</sup> Spiru Haret was the greatest reformer of the Romanian school in the 19<sup>th</sup> century, famous for the organization of modern Romanian education from the position of Minister of Education, which he held three times. He was a member of the Romanian Academy.

<sup>6</sup> Plato, *Works, vol. VI, the Republic*, Bucharest, The Scientific and Encyclopedic Publishing House, 1986, Aristotle, *op.cit.*

<sup>7</sup> Lowi, apud, Ramesh & Hawlett, *The Study of Public Policies*, Chişinău, Epigraf Publishing House, 2004.

<sup>8</sup> G. Pohoată, *Public Policies. Theory and Practice*, Bucharest, Pro Universitaria Publishing House, 2017.

the specialized literature<sup>9</sup>, but in general, the content of the educational policy concerns the organization of the education system, the functioning of institutions at all levels, the financing of education, evaluation, management, curriculum, selection, training, improvement and the promotion of teaching staff. In a concrete case, in order to ensure the connection and continuity between higher education cycles from the perspective of the qualifications framework, several basic dimensions have been identified - educational and institutional policies, qualifications and purposes, educational plans, training contents, the training process, internships.<sup>10</sup> The interference of politics in education led to the lack of continuity of educational policies in Romanian education, educational policies being reformulated with each minister as follows: *Miclea package*, *Andronescu package*, *Funeriu package*, *Câmpeanu package*, *Deca package*, etc. On the other hand, even if policies are also instantiated in the form of laws and general norms, a public policy is not reducible only to a law, as happened in Romanian education, deeply politicized, mistaking the goal for the means. Indisputably, public policies are related to the political system, but they must be developed by experts, researchers, teachers, scholars knowledgeable of the system. One of the most tempting terms in the study of public policies is that of *policy makers*, the authors of public policies. There are many criteria identified in the specialized literature for distinguishing them, but the most important ones relate to authority, expertise and responsibility. The inefficiency, incoherence and lack of credibility of the Romanian educational policies, whether it is about pre-university education or higher education, clearly shows that education in Romania has not been treated with seriousness and professionalism, and the authors of the policies were not primarily specialists, teachers, experts familiar with the system, these being consulted to a small extent, the decision being the prerogative of the political authority and not of the epistemic one. Thus, the various changes, modifications carried out under the influence of those seen outside the country, the accession of Romanian educational policies to the European ones, especially after 2007, the connection of higher education to the Bologna system, can hardly be considered "educational reform". Reforming by means of imitation and cultural mimicry leads only to disorganization and destructuring, as well

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<sup>9</sup> D. Wadi Haddad, *Education policy-planning process: an applied framework*, Paris, 1995. UNESCO - International Institute for Educational Planning.

<sup>10</sup> Education Policy Outlook, 2015, *Making Reforms Happen*.

as to unnecessary social costs and losses (e.g. the exodus of young people from the country, the lack of policies for the insertion of young people into the labor market, the absence of an ethics of caring for young people in particular!).

### *“The Educated Romania” from project to reality*

On January 24, 2016, on the 157<sup>th</sup> anniversary of the Union of the Romanian Principalities and a little over a year after assuming the mandate of President of Romania, Klaus Iohannis announced his mandate project: “The Educated Romania”. Here is the President's motivation presented on that occasion: “As I said in the beginning, the lesson of the Little Union is more relevant than ever. One of the great reforms in the United Principalities was a new Romanian school law, that of 1864. Fully aware of the importance of the role that education has in the life of a nation, I am determined to fulfill together the great project that I entitled “The Educated Romania”. I call all responsible politicians to join me in this endeavor in the future. The cornerstone of a nation is education, and through an effective and efficient education system, the future of a country is built. I will not give in to the temptation to rush things. I want to build this project with wisdom and attention, the huge stake of which is a Romania capable of offering its citizens equal opportunities and solid career options”<sup>11</sup>, Klaus Iohannis announced enthusiastically. The President's ideas remained at the project stage, because the budget allocated to education did not exceed 4% of GDP, it even decreased, reaching the historic minimum of 2.5% of GDP in 2021, although governments supported by the President were in power. Moreover, all the European Commission's country reports, as well as recent editions of the Commission's Education and Training Monitor, emphasize the seriousness of the situation: “Romania's expenditures on education remain among the lowest in the EU. From here, all the consequences derive”<sup>12</sup>.

- The early school leaving rate has decreased, but remains high. The percentage of 18- to 24-year-olds who left school early has decreased for the fourth consecutive year (at the time of analysis-2021). However, at the level of 15.3% in 2019, the rate remains one of the highest in the EU, well

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<sup>11</sup> <https://www.edupedu.ro/romnia-dez-educata-sau-cum-a-acaprat-klaus-iohanis-educatia-tocmai-ca-sa-o-ingroape/> Ciprian Purice, 16 sept. 2021

<sup>12</sup> Source: The Education and Training Monitor 2020, [https://op.europa.eu/webpub/eac/education-and-training-monitor-2020/countries/romania\\_ro.html](https://op.europa.eu/webpub/eac/education-and-training-monitor-2020/countries/romania_ro.html)

above the EU average (10.2%) and Romania's target for 2020 (11.3%). There is still no integrated approach to preventing early school leaving, but only sporadic efforts to improve the quality of education in schools with high dropout rates.

- The digital infrastructure in schools is not sufficiently developed, especially in rural areas. Compared to the EU average, far fewer schools are digitally equipped and connected. Only 14% of the Romanian students in primary education (EU average-35%), 16% in lower secondary education (EU average -52%) and 31% in upper secondary education (EU average-72%) study in such schools (European Commission-2019).

- Although measures have been taken to mitigate the impact of the COVID-19 pandemic in the field of education, there is a risk to deepen the inequalities and inequities already accentuated due to the shift to distance learning.

- The percentage of students with a low level of knowledge in reading, mathematics and science is very high and the situation has not improved. 40.8% of 15-year-old Romanian students had difficulties understanding texts, a percentage of 46.6% had difficulties interpreting and recognizing how some simple situations can be represented mathematically, and 43.9% of them did not have a basic level of knowledge in the field of science. This low knowledge level is among the highest in the EU and is roughly double the EU average (22.7% for reading, 22.9% for math's and 22.3% for science).

- The percentage of students with good results, that is students who demonstrated that they have complex knowledge in the tested subjects is very low, well below the EU average-1.4% in reading (EU average-8.5%), 3.2 % in mathematics (EU average-11%), 1% in science (EU average-6.3%).

In parallel with the analysis of the European Commission, the famous Pisa tests of the Organization for Economic Cooperation and Development-OECD confirm the precarious situation in Romanian education, increasingly accentuated from one year to the next. Thus, on average, 44% of the Romanian students do not understand what they read, cannot do basic arithmetic operations and cannot perform elementary correlations, i.e. they are functionally illiterate. Results in PISA tests were found to be getting worse and worse. That is, more and more students do not know how to read, calculate or understand the physico-chemical phenomena in the environment. And if the Pisa tests come to quantify the level of functional illiteracy, i.e. people who go to school, but do not

accumulate elementary notions of learning, there is an even more disastrous part of “The Educated Romania” - children who do not go to school at all, which means really illiterate ones.

A study carried out by Save the Children Romania pointed out that in the 2019-2020 school year, one in four students from rural areas did not enroll in compulsory education or dropped out of school. And the online school during the pandemic deepened the phenomenon, because the same study concluded that, at the national level, 28% of children and 43% of teachers do not possess - partially or totally - the material resources necessary for online education.

The Romanian higher education is not competitive either at European and international level, the year 2021 being the first one in which no Romanian university was included in the ranking drawn up by the QS World University Rankings. On the other hand, plagiarism has become a phenomenon in the Romanian academic environment, being the most serious deviation from ethics and academic integrity<sup>13</sup>, illustrating the systemic corruption existing at the higher level of education in Romania.

### *Romanian education in European and international evaluations*

Romania has the worst results at the European level in terms of education equity, according to the evaluation published by the European Commission.<sup>14</sup> And this, given that equity, along with the shortage of teaching staff, is among the main challenges that the European forums foresee in the coming period, in the effort to build the European Education Area. The Education and Training Monitor - 2022, published by the European Commission together with these evaluations, also shows how far behind Romania remains compared to the rest of the EU countries, regarding the main European targets in terms of education. Thus, when the Commission approved a report on the progress made in order to achieve the European Education Area (EEA)<sup>15</sup>, it lay the emphasis on a new European indicator on equity in education, an indicator introduced because **“the socio-**

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<sup>13</sup> G. Pohoacă, *Ethics in the Romanian Academic Environment-A must*. Euromentor Journal, vol. IX, no.3/2018, p. 7.

<sup>14</sup> <https://www.edupedu.ro/romania-cel-mai-slab-rezultat-in-europa-in-ceea-ce-priveste-echitatea-educatiei-se-mentin-decalajele-masive-fata-de-media-europeana-si-de-tintele-ue-la-principali-indicatori-cheie-in-educatie/>

<sup>15</sup> Source: The European Commission. (2nd Survey of Schools: ICT in Education (Al doilea sondaj în școli: TIC în educație). DG CNECT, 2019. <https://ec.europa.eu/digital-single-market/en/news/2nd-survey-schools-ict-education> (see also the country reports)

**economic status has a huge effect on performance in education”**. For this, the PISA evaluation carried out by the Organization for Economic Cooperation and Development (OECD) is taken into account, in which Romania recorded, together with Bulgaria, among the worst results at the European level, in the 2018 edition. The current indicator used by The EU relies on PISA 2018 data, but the EEA progress report states that an update will be made after the next PISA results, which will be announced in a year's time. Based on current data, the new EU indicator on equity in education compares the percentage of underachievement at country level – in reading, mathematics and science (combined) within PISA 2018 – among 15-year-old pupils with the lowest socio- economic status and the results of students in the upper quarter of the economic, social and cultural index. **Thus, Romania comes last in Europe, with the biggest difference (about 40% combined poor results in PISA 2018).**

### **Romania's poor performance in the main European indicators concerning education**

The above mentioned report was accompanied, at the time of its publication, by the 2022 edition of the EU Monitor on Education and Training.<sup>16</sup> Romania's country sheet shows that the country remains far behind the EU average when it comes to community education objectives, according to the data for 2021. Thus:

- If, at the European level, **the average participation in early education** is 93%, against a target of 96% in 2030, Romania has an average of 78.2% in 2021.

- **Poor results in reading, mathematics and science:** the situation is the same as in 2018 – Romania has percentages three times higher than the European target (40-46%, compared to percentages below 15%), while the European average is much higher close to the 2030 target (22-23%).

- If, regarding the **early school leaving rate**, the percentage in the case of Romania is 15.3% in 2021, the European average, of only 9.7%, is much closer to the target of 9% in 2030.

- The rate of early school leaving is high, especially among Roma students – only 22% of young Roma between the ages of 18-24 have finished high school.

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<sup>16</sup> Source: The Education and Training Monitor  
[https://op.europa.eu/webpub/eac/education-and-training-monitor-2022/countries/romania\\_ro.html](https://op.europa.eu/webpub/eac/education-and-training-monitor-2022/countries/romania_ro.html).

- Differences in early school leaving rates between urban (4.5%) and rural (23.2%) areas are substantial.
- Despite a decrease in the percentage in recent years, Romania remains last in Europe in terms of the early school leaving rate.
- **Vocational education graduates' access to work-based learning** is another major area of delays, in the case of Romania: If the EU exceeded the 60% target set for 2025, the valid percentage in the case of Romania is almost 9 times lower (7.1%).
- The participation rate of Roma children is much lower, at only 27%, although children from disadvantaged backgrounds have the most to gain from early education, according to researchers.
- In the case of the **rate of higher education graduate young people aged 25-34**, Romania has a percentage of only 23%, half compared to the EU (41%) and the 45% target proposed by the EU for 2030.

*The report reviews the numerous demographic and social causes that determine the very low rate of those completing higher education programs – twice as low as the European rate. And it adds, among other things, that although our country produces one of the highest rates of graduates in IT&C and STEM fields at EU level, it fails to cover the needs of the labor market. Romania ranks last in the EU in terms of higher education graduates, according to data from Eurostat, the European Statistical Office. In 2021, just over 23% of Romanians between the ages of 25 and 34 had completed some form of higher education, the European average being 41%. The latest available data show that for every 1,000 people aged between 20 and 29 there are 46.2 higher education graduates (ISCED 5-8) in Romania compared to 61.9 on average at EU level.*

Of course, for any Romania scholar, such statistics, evaluations are meant to raise our awareness of the deadlock in which education finds itself today, which was also confirmed by the longest strike of the teaching staff. Romanian education has a lot to change even concerning those aspect where, at least in the documents, it seems to be doing well, it results from a speech held in Cotroceni<sup>17</sup>, by one of the most renowned international specialists in the field, Andreas Schleicher, the Education Director of the Organization for Economic Cooperation and Development (OCED). We briefly present his main conclusions, intended to invite us to

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<sup>17</sup> Conference: “The Educated Romania” – Public Policies...January 2020  
<https://www.edupedu.ro//invatamantul-romanesc-vazut-prin-ochi-internationali-o-descriere-nemiloasa-de-la-seful-educatiei-ocde>

reflection and to a fundamental change in the Romanian education, to a new type of *axiological education*<sup>18</sup> in the *School of the Future*.

\* Education changes along with technologies, knowledge is much more difficult to convey than it was 20 years ago. Now, the world needs much more complex things than 20 years ago - and here is Romania's weak point.

\* The problem of equity in Romanian schools is a very big one. Plus - the most disadvantaged 10% of students from the four Chinese provinces participating in PISA have better results than the most advantaged 10% of Romanian students.

\* There are very large variations in the performance of various schools in Romania. The distance between them should be reduced and collaboration encouraged.

\* You can say that in the 20<sup>th</sup> century democracy was about the right to be equal with others. In the 21<sup>st</sup> century, democracy is about the right to be different. We need to understand why students need to learn differently.

\* In the current technological context it is necessary develop complex thinking and different skills are needed – the great challenge for Romania. There is no need to teach even more in the way you have so far.

\* More life satisfaction is needed for students and professional enthusiasm for teachers. We need very knowledgeable teachers, leaders, teachers who collaborate, learn from each other and spend more time with the student, outside the classroom.

### *Instead of conclusions*

If someone really wanted to rebuild the Romanian school and stop its decline, including plagiarism, it would be necessary to depoliticize education, capitalize on the experience of the authentic teachers that this country has, redesign the institutions and systems of training, train and improve the teaching staff because the teachers and the teaching staff represent the most important component of the education and training system. **Teacher policy reform remains essential to making progress in school education.** Research in the field of education has identified teachers and teaching methods as the most important factor affecting the quality of education. From the educator to the high school teacher and the

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<sup>18</sup> G. Pohoată & Jukka Kangaslahti, *Education for the Future*, Euromentor Journal, vol. VIII, no.4/2017, pp. 7-18.

university teaching staff, didactic and pedagogical training must be the selection criterion, to be at the chair. Moreover, from the politically appointed Minister of Education to the last school principal, a precise grid of axiological criteria aimed at didactic and pedagogical training must be introduced in the Romanian school. It is no longer allowed in a democratic state for political promotion to ignore professional training. A person's ethos is built only through education. This is what differentiates us as individuals, as peoples.

This imperative can be found in the topic of the international conference of the DFP from UEB, *Investment in Education, Investment in the future!*, a topic inspired by the book of Prof. Jukka Kangaslahti, which I launched on November 13, 2012, in the aula of the Christian University "Dimitrie Cantemir", an event attended by over 500 teachers and school inspectors from the Municipality of Bucharest. This moment forwarded the International Conference *Education in the Future*, organized in April 2013, as the initiator Dean of the Faculty of Educational Sciences, within the same university, which was attended by education specialists, teachers, researchers, from the country and from abroad.

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# MANIFESTATION OF SPECIFIC ANXIETY POST COVID-19 IN ADOLESCENTS/SCHOOL CHILDREN

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***Abstract:** Mental health specialists but especially teachers and parents should get directly involved in identifying several dysfunctional mental manifestations in adolescents/schoolchildren that can lead to certain maladaptive behaviors. Therefore, it is a priority to train them to become aware of, recognize and monitor certain manifestations that are specific to dysfunctional behaviors, aiming to maintain both the mental health balance of each and every adolescent and of the entire group. Teachers may recommend or call for the school's therapist to offer proper mental health services to adolescents, so that, whenever necessary, they could benefit from specialized support through mental health assessment techniques, mental health first aid, support and counselling techniques. Through the present paper we set out to call the teachers and parents' attention to a series of concrete data regarding the anxiety-specific manifestations in adolescents, which can help them in the process of monitoring, supporting and improving mental health balance.*

***Keywords:** anxiety, coping mechanisms, specialized therapeutic intervention*

## **General theory**

Specific studies have shown that some of the causes that concur with the onset of anxiety-specific manifestations may be cognitive and emotional

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**Note:** authors have equal contributions to the conduct of the research.

immaturity, inharmonious development, asthenic syndrome development, psychopathology of epilepsy, schizophrenia, hysteria etc.

In a paper from 2007, G. Sion<sup>1</sup> pointed out that the risk factors of inharmonious personality development are noticed since childhood or adolescence and mainly refer to behavioral characteristics that contribute to the attempt and onset of addiction disorders, namely the use of alcohol and various psychotropic substances, as well as to several juvenile delinquency elements, such as missing out on school activities, even dropout attempts, running away from home etc.

Most frequently, these behaviors are based, as causing factors, on the repeated failures to establish healthy social relationships and manage the emotions triggered by cognitive rigidity. In many cases, socializing is made most of the time with people who demonstrate the presence of heightened personality traits, while negative experiences support, validate, promote and perpetuate themselves as adaptive behavioral solutions to the hostile-perceived reality.

It is expected that, following the pandemic, which generated so much stress and social frustration, we may face a series of cases specific to mental syndromes, that can intensify even further due to situations that are typical of a social, economic, political and military context, like the war at the borders.

Adolescents may be influenced by the news, public information or even family, and in time they might come to present manifestations related to stress or specific to depression and anxiety disorders, which, undiagnosed on time, may aggravate and negatively influence the child's educational and professional journey later on (Montgomery<sup>2</sup>, 2021).

**The early approach of the cases with different mental manifestations through activities that are typical of prevention or specialized intervention, may have the following effects:**

- **preventing the chronicization of manifestations that are specific to acute stress, anxiety, depression etc.;**
- preventing the use and, later on, the addiction of various psychoactive substances;
- preventing the consequences associated with personality disorders and related comorbidities.

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<sup>1</sup> G. Sion, *Age Psychology, Romania of Tomorrow Foundation Publishing House, 2007.*

<sup>2</sup> H. Montgomery, *Years of adolescence, Bucharest, Publishing House Trei, 2021.*

## **The methodology of the research**

### **The objectives of the research**

The general objective of the present paper aims at highlighting the role of certain mental characteristics within the range of personality traits and the importance of coping mechanisms in adolescents for managing anxiety-specific manifestations, taking into account four specific objectives, namely:

- **Objective no. 1** aims at studying the influence of independent variables and mental characteristics within the range of personality traits on the level of anxiety in adolescents, generated by the circumstances and requirements of school tasks;

- **Objective no. 2** aims at highlighting the fact that the optimal functioning of coping mechanisms in some adolescents may be a facilitating factor for managing anxiety;

- **Objective no. 3** aims at highlighting the difference between adolescents who possess optimal functioning of coping mechanisms and the low levels of anxiety in relation to their gender.

- **Objective no. 4** aims at elaborating and following proper psychoeducation programs addressed to the group in order to prevent the occurrence of dysfunctional psychobehavioral manifestations, as well to ensure individual psychological counselling programs addressed to adolescents with such needs.

### **The hypotheses of the research**

In order to fulfil the objectives of our research, we've set out with the following hypotheses:

- **Hypothesis no. 1** - We assume that there are some interdependence and influence relations between certain personality traits and the level of anxiety in adolescents.

- **Hypothesis no. 2** - We assume that there are interdependence and influence relations between some coping mechanisms and the level of anxiety in adolescents.

- **Hypothesis no. 3** - We assume that adolescents who possess optimism have their anxiety level influenced significantly.

- **Hypothesis no. 4** - We assume that there are significant differences regarding the level of anxiety based on gender.

- **Hypothesis no. 5** - We assume that there are differences regarding the optimal functioning of coping mechanisms and the anxiety level based on gender.

### **Description of the sample group**

The reference population targets adolescents that are integrated in the high school environment. Therefore, the target population for making up

the research sample was selected by including 9<sup>th</sup> grade children from a technological-profile high school in Bucharest, with the following specialties: furniture and interior design technician, ecology and environment quality protection technician and tourism technician.

The sample group was made of 90 schoolchildren aged between 14 and 15, both male and female, and the data was collected throughout 2 months in 2022.

The participants who make up the research sample group were selected according to the requirements of non-probability sampling techniques (non-random) and the convenience sampling technique, that doesn't take into account the requirement to indicate the case selection probability. As a result, there is no guarantee that the sample group consisted of cases that faithfully describe the reference population.

### **The instruments employed to collect data**

For the psychological assessment of the adolescents who are part of the research sample group four standardized instruments were used, found on the Cognitrom platform PEDb<sup>3</sup>:

- *The Big Five Personality Test (BFPT)* designed to evaluate five personality factors/ traits (Openness, Conscientiousness, Extraversion, Agreeableness and Neuroticism), as well as to evaluate social Desirability;

- *The Cognitive Emotion Regulation Questionnaire (CERQ)* designed to evaluate nine cognitive coping mechanisms employed in situations or life circumstances that are negative or even traumatic;

- *Adolescent Psychopathology Scale Short Form (APS-SF)* derives from the standard version of the Adolescent psychopathology scale (APS; Reynolds, 1998a, 1998b, 1998c). The original APS scale was meant to assess the symptoms of clinical disorders and distress in adolescents, keeping in mind the descriptions of the clinical symptoms from the *DSM IV*.

APS-SF consists of 12 clinical subscales and 2 validity subscales. Six subscales are meant to reflect the main symptoms presented in the *DSM IV* and associated with the following disorders: conduct disorder (*CD*), opposition defiant disorder (*ODD*), major depressive disorder (*MDD*), generalized anxiety (*GA*), posttraumatic stress (*PTS*), and substance use (*SU*). The other six clinical subscales aren't particularly associated with *DSM IV* disorders or symptoms, yet they assess relevant aspects related to

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<sup>3</sup> Cognitrom platform PEDb, Developmental assessment platform 6/7-18/19 years (PEDb) <https://www.cognitrom.ro/produs/evaluarea-dezvoltarii-adolescenti/>, 2022.

psychosocial problems in adolescents, and they include: eating disorder (ED), suicide (SUI), school problems (SP), prevalence to violence/ anger (PVA), self-consciousness (SC) and interpersonal problems (IP).

- *The optimism test (OT)* is designed for assessing the explanatory style (optimist vs pessimist), and can be used to diagnose personality, in education, in healthcare and psychology. Given that many items of the test refer to the assessed person's school/ professional activity and their relationships with friends, one must be careful when interpreting the results of people who lead an isolated life, have very few friends, don't have a job, have never worked, nor take up classes of any form of studies.

### The results of the research

In order to demonstrate Hypothesis no. 1, with the content *"We assume that there are some interdependence and influence relations between certain personality traits and the level of anxiety in adolescents"*, the Pearson correlation method and the Linear Regression analysis were used.

The results obtained are presented in Table 1, Table 2, Table 3 and Table 4.

**Table. 1 - Mean and standard deviation for personality traits and anxiety**

	Mean	Standard deviation	N
Anxiety	58.39	8.478	108
extraversion	52.30	15.218	108
agreeableness	58.21	11.841	108
conscientiousness	56.58	12.023	108
openness	48.45	10.058	108
neuroticism	51.43	14.196	108

**Table 2 - Correlations between personality traits and anxiety**

	Anxiety	Extraversion	Agreeableness	Conscientiousness	Openness	Neuroticism
Anxiety Pearson Correlation	1	-.515**	.103	.399**	-.356**	-.278**
Sig. (2-tailed)		.000	.289	.000	.000	.004
N	108	108	108	108	108	108
Extraversion Pearson Correlation	-.515**	1	.051	-.307**	.606**	.675**
Sig. (2-tailed)	.000		.597	.001	.000	.000
N	108	108	108	108	108	108
Agreeableness Pearson Correlation	.103	.051	1	.540**	-.220*	-.162

Conscientiousness	Sig. (2-tailed)	.289	.597		.000	.022	.093
	N	108	108	108	108	108	108
	Pearson Correlation	.399**	-.307**	.540**	1	-.191*	-.404**
Openness	Sig. (2-tailed)	.000	.001	.000		.047	.000
	N	108	108	108	108	108	108
	Pearson Correlation	-.356**	.606**	-.220*	-.191*	1	.633**
Neuroticism	Sig. (2-tailed)	.000	.000	.022	.047		.000
	N	108	108	108	108	108	108
	Pearson Correlation	-.278**	.675**	-.162	-.404**	.633**	1
	Sig. (2-tailed)	.004	.000	.093	.000	.000	
	N	108	108	108	108	108	108

\*\* Correlation is significant at the 0.01 level (2-tailed); \* Correlation is significant at the 0.05 level (2-tailed).

**Table 3 - Descriptive data for Linear Regression (ANOVA) anxiety and personality traits**

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	2915.755	5	583.151	12.454	.000 <sup>b</sup>
	Residual	4775.912	102	46.823		
	Total	7691.667	107			

a. Dependent Variable: anxiety; b. Predictors: (Constant), neuroticism, agreeableness, conscientiousness, openness, extraversion

**Table 4 - Linear regression coefficients (ANOVA) for anxiety and personality traits**

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	95.0% Confidence Interval for B	
	B	Std. Error	Beta			Lower Bound	Upper Bound
(Constant)	58.964	5.787		10.190	.000	47.487	70.442
Extraversion	-.271	.068	-.487	-3.998	.000	-.406	-.137
Agreeableness	-.050	.075	-.070	-.671	.504	-.198	.098
Conscientiousness	.267	.076	.379	3.530	.001	.117	.417
openness	-.177	.097	-.210	-1.830	.070	-.369	.015
neuroticism	.194	.072	.325	2.710	.008	.052	.336

In order to interpret the data from Table 2, we take into account the following (Colton, 1974):

- a correlation coefficient from -0.25 to 0.25 means a poor or null correlation;

- a correlation coefficient from 0.25 to 0.50 (or from -0.25 to -0.50) means an acceptable association degree;

- a correlation coefficient from 0.50 to 0.75 (or from -0.50 to -0.75) means a moderate to good correlation;

- a correlation coefficient greater than 0.75 (or lower than -0.75) means a very good association or correlation. To that end, we may conclude that:

- between the anxiety variable and the extraversion variable we may notice that the value of the correlation coefficient is moderate to good, being of -.515, which means that there is a relation between the two variables, and the minus sign may call attention to the fact that anxiety decreases when extraversion increases;

- between the anxiety variable and the openness and neuroticism variables we may notice acceptable values of the correlation coefficient; between anxiety and openness, the value of the correlation coefficient is -.356, and between anxiety and neuroticism, the value of the correlation coefficient is -.278, which means that there is an acceptable association relation between the aforementioned variables, and the minus sign indicates that anxiety decreases when openness and neuroticism increase and vice versa;

- moreover, between the anxiety variable and the conscientiousness variable there is an acceptable association relation, the value of the correlation coefficient being positive, namely of .399, which means that anxiety and conscientiousness evolve or influence each other in the same way of development.

Through the data presented in Table 4, obtained by means of the linear regression analysis, the values of the coefficients are highlighted with respect to the way of explaining the influence of the five personality traits as independent variables or predictors (if their level remains constant) on the level of anxiety, as a dependent variable, namely the differential variance, from which **we may conclude that** extraversion explains - 4,87 % from the level of anxiety, agreeableness -7%, conscientiousness 3,79%, openness -2,1%, neuroticism 3,25%, and the remaining percentage up to 100% can be explained by other unknown factors that influence the accumulated level of anxiety.

*Partial conclusion: Taking into account the data presented in Tables 1 to 4, we may appreciate that Hypothesis no.1 is statistically grounded.*

In order to demonstrate Hypothesis no. 2, with the content "We assume that there are interdependence and influence relations between some coping

*mechanisms and the level of anxiety in adolescents”, the Pearson correlation statistical method and the simple linear regression analysis were used. The results are presented in Table 5, Table 6a, Table 6a, Table 7 and Table 8.*

**Table 5 – The mean and standard deviation for anxiety and coping mechanisms**

	Mean	Std. Deviation	N
Anxiety	58.39	8.478	108
self-blame	10.37	3.050	108
Acceptance	12.14	2.688	108
Rumination	10.65	3.279	108
positive reappraisal	12.39	3.286	108
planning-focused	12.60	3.168	108
positive re-evaluation	12.05	3.061	108
putting to perspective	12.22	3.566	108
catastrophizing	9.56	3.079	108
blaming others	9.61	3.099	108

**Table. 6 a – Correlation values regarding anxiety and coping mechanisms**

		anxiety	self-blame	acceptance	rumination	positive reappraisal	planning-focused
anxiety	Pearson Correlation	1	.629**	-.437**	.639**	-.557**	-.504**
	Sig. (2-tailed)		.000	.000	.000	.000	.000
	N	108	108	108	108	108	108
self-blame	Pearson Correlation	.629**	1	-.698**	.803**	-.815**	-.747**
	Sig. (2-tailed)	.000		.000	.000	.000	.000
	N	108	108	108	108	108	108
acceptance	Pearson Correlation	-.437**	-.698**	1	-.657**	.757**	.750**
	Sig. (2-tailed)	.000	.000		.000	.000	.000
	N	108	108	108	108	108	108
rumination	Pearson Correlation	.639**	.803**	-.657**	1	-.666**	-.723**
	Sig. (2-tailed)	.000	.000	.000		.000	.000
	N	108	108	108	108	108	108
positive reappraisal	Pearson Correlation	-.557**	-.815**	.757**	-.666**	1	.812**
	Sig. (2-tailed)	.000	.000	.000	.000		.000
	N	108	108	108	108	108	108

Pearson planning Correlation	-.504**	-.747**	.750**	-.723**	.812**	1
-focused Sig. (2-tailed)	.000	.000	.000	.000	.000	
N	108	108	108	108	108	108

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

**Table 6 b - Correlation values regarding anxiety and coping mechanisms**

		anxiety	positive reappraisal	putting in perspective	catastro-phizing	blaming others
anxiety	Pearson Correlation	1	-.492**	-.552**	.505**	.517**
	Sig. (2-tailed)		.000	.000	.000	.000
	N	108	108	108	108	108
positive reappraisal	Pearson Correlation	-.492**	1	.798**	-.797**	-.758**
	Sig. (2-tailed)	.000		.000	.000	.000
	N	108	108	108	108	108
putting in perspective	Pearson Correlation	-.552**	.798**	1	-.780**	-.808**
	Sig. (2-tailed)	.000	.000		.000	.000
	N	108	108	108	108	108
catastro-phizing	Pearson Correlation	.505**	-.797**	-.780**	1	.868**
	Sig. (2-tailed)	.000	.000	.000		.000
	N	108	108	108	108	108
blaming others	Pearson Correlation	.517**	-.758**	-.808**	.868**	1
	Sig. (2-tailed)	.000	.000	.000	.000	
	N	108	108	108	108	108

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

**Table 7 - Linear regression descriptive data (ANOVA)**

Model	Sum of Squares	df	Mean Square	F	Sig.
1 Regression	3613.139	10	361.314	8.593	.000 <sup>b</sup>
Residual	4078.527	97	42.047		
Total	7691.667	107			

a. Dependent Variable: anxiety; b. Predictors: (Constant), blaming others, optimism, acceptance, rumination, positive re-evaluation, positive reappraisal, putting in perspective, self-blame, planning-focused, catastrophizing

**Table 8 - Linear regression coefficients for anxiety and coping mechanisms**

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.	95.0% Confidence Interval for B	
	B	Std. Error	Beta			Lower Bound	Upper Bound
(Constant)	45.186	12.238		3.692	.000	20.896	69.475
optimism	-.006	.076	-.011	-.082	.935	-.156	.144
self-blame	.818	.484	.294	1.690	.094	-.143	1.780
acceptance	.469	.423	.149	1.109	.270	-.371	1.309
rumination	1.205	.390	.466	3.089	.003	.431	1.979
positive reappraisal	-.659	.426	-.256	-1.547	.125	-1.505	.187
planning-focused	.253	.472	.094	.535	.594	-.684	1.189
positive re-evaluation	-.336	.482	-.121	-.696	.488	-1.293	.621
putting in perspective	.046	.400	.019	.115	.909	-.748	.840
catastrophizing	-.354	.492	-.128	-.719	.474	-1.330	.622
blaming others	-.170	.481	-.062	-.353	.725	-1.125	.785

a. Dependent Variable: anxiety

From the data presented in Tables 6 a and 6 b, we may conclude that:

- between the anxiety variable and the self-blame, rumination, catastrophizing and blaming others variables we have moderate to good correlation coefficient values (0.629; 0.639; 0.505 and 0.517), in a positive way (+ sign), which means that there is an association relationship between the aforementioned variables, and the plus sign may call the

attention to the fact that anxiety decreases when self-blame, rumination, catastrophizing and blaming others also decrease, as well as vice versa;

- moreover, between the anxiety variable and the acceptance, positive reappraisal, planning-focused, positive re-evaluation and putting in perspective variables we have moderate to good correlation coefficient values (-0.437; -0.457; -0.504; -0.492 and -0.552), in a negative way (- sign), which means that there is an association relationship between them, and the minus sign highlights the fact that anxiety decreases when acceptance, positive reappraisal, planning-focused, positive re-evaluation and putting in perspective increase, as well as vice versa.

Through the data presented in Table 8, obtained by means of the simple linear regression analysis, the coefficient values are highlighted with respect to the way of explaining the influence of the nine coping mechanisms on the level of anxiety, as a dependent variable, and the differential variance, respectively, from which we may conclude that the coping mechanisms thus explain self-blame as 29,4% of the level of anxiety, rumination 14,9%, catastrophizing 12,8%, blaming others 6,2%, acceptance 14,9%, positive reappraisal 25,6%, planning focused 9,4%, positive re-evaluation 12,1% and putting in perspective 1,9%.

*Partial conclusion: Taking into account the data presented in Tables 5 to 8, we may appreciate that Hypothesis no. 2 is statistically grounded.*

In order to demonstrate Hypothesis no. 3, with the content “We assume that adolescents who possess optimism have their anxiety level influenced significantly”, the Pearson correlation statistical method was used. The results are presented in Table 9 and Table 10.

**Table 9 - Anxiety and optimism descriptive data**

	Mean	Std. Deviation	N
Anxiety	58.39	8.478	108
Optimism	53.81	14.404	108

**Table 10 - Anxiety and optimism correlation coefficients**

		anxiety	optimism
anxiety	Pearson Correlation	1	-.492**
	Sig. (2-tailed)		.000
	N	108	108
optimism	Pearson Correlation	-.492**	1
	Sig. (2-tailed)	.000	
	N	108	108

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

From the data presented in Tables 9 and 10, we may conclude that between the anxiety variable and the optimism variable we have moderate to good correlation coefficient values, namely -0,492, in a negative way (- sign), which means that there is an association relationship between the aforementioned variables, and the minus sign highlights the fact that anxiety decreases when optimism increases, as well as vice versa.

*Partial conclusion: Taking into account the data presented in Tables 9 and 10, we may appreciate that Hypothesis no. 3 is statistically grounded.*

In order to demonstrate Hypothesis no. 4, with the content "We assume that there are significant differences regarding the level of anxiety based on gender", the Independent sample test statistical method was used. The results obtained are presented in Table 11 and Table 12.

**Table 11 - Mean and anxiety standard deviation in girls and boys**

	gender	N	Mean	Std. Deviation	Std. Error Mean
Anxiety	boys	32	57.34	8.823	1.560
	girls	76	58.83	8.350	.958
anxiety level	boys	32	1.78	.906	.160
	girls	76	1.88	.832	.095

**Table 12 - Anxiety mean differences in girls and boys with the Independent Samples Test method**

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Anxiety	E.V.A.*	.129	.720	-.830	106	.408	-1.485	1.789	-5.033	2.062
	E.V.N.A.**			-.811	55.524	.421	-1.485	1.830	-5.152	2.182
anxiety level	E.V.A.*	1.830	.179	-.557	106	.579	-.100	.180	-.457	.257
	E.V.N.A.**			-.538	54.091	.593	-.100	.187	-.474	.274

E.V.A. \* Equal variances assumed; E.V.N.A. \*\* Equal variances not assumed

Following the analysis of the data presented in Tables 11 and 12, we may conclude that:

- there are highlighted differences between the two people categories with respect to the level of anxiety, even if their values aren't that high;
- in the T significance test, presented in Table 12, the values obtained for the two people subgroups, namely the value of -0.830, by comparison with the value of -0.557, indicated some sort of difference (column t).

*Partial conclusion: Taking into account the data presented in Tables 11 and 12, we may appreciate that Hypothesis no. 4 is statistically grounded, mentioning that the two subgroups aren't equal, which may be a source of error.*

In order to demonstrate Hypothesis no. 5, with the content "We assume that there are differences regarding the optimal functioning of coping mechanisms and the anxiety level based on gender", the Independent samples test statistical method was used. The results obtained are presented in Table 13 and Table 14.

**Table 13 - Anxiety and coping mechanisms mean and standard deviation in girls and boys**

	gender	N	Mean	Std. Deviation	Std. Error Mean
Anxiety	boys	32	57.34	8.823	1.560
	girls	76	58.83	8.350	.958
self-blame	boys	32	10.41	3.151	.557
	girls	76	10.36	3.027	.347
Acceptance	boys	32	11.72	2.820	.498
	girls	76	12.32	2.629	.302
Rumination	boys	32	10.59	3.800	.672
	girls	76	10.67	3.061	.351
positive reappraisal	boys	32	12.03	3.515	.621
	girls	76	12.54	3.198	.367
planning-focused	boys	32	12.34	3.677	.650
	girls	76	12.71	2.948	.338
positive re-evaluation	boys	32	11.63	3.300	.583
	girls	76	12.22	2.960	.340
putting in perspective	boys	32	12.06	4.557	.806
	girls	76	12.29	3.089	.354
Catastrophizing	boys	32	10.41	3.591	.635
	girls	76	9.21	2.787	.320
blaming others	boys	32	10.41	3.775	.667
	girls	76	9.28	2.726	.313

**Table 14 - Anxiety and coping mechanisms mean differences in girls and boys (Independent Samples tes)**

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
anxiety	E.V.A.*	.129	.720	-.830	106	.408	-1.485	1.789	-5.033	2.602
	E.V.N.A.**			-.811	55.524	.421	-1.485	1.830	-5.152	2.182
self-blame	E.V.A.*	.775	.381	.079	106	.937	.051	.646	-1.229	1.331
	E.V.N.A.**			.078	56.274	.938	.051	.656	-1.264	1.366
acceptance	E.V.A.*	.415	.521	-1.055	106	.294	-.597	.566	-1.719	.525
	E.V.N.A.**			-1.025	54.814	.310	-.597	.583	-1.765	.571
rumination	E.V.A.*	2.567	.112	-.111	106	.912	-.077	.694	-1.454	1.299
	E.V.N.A.**			-.102	48.747	.919	-.077	.758	-1.601	1.446
positive reappraisal	E.V.A.*	.135	.714	-.732	106	.466	-.508	.694	-1.884	.868
	E.V.N.A.**			-.704	53.677	.484	-.508	.722	-1.955	.939
planning-focused	E.V.A.*	3.621	.060	-.548	106	.585	-.367	.670	-1.695	.961
	E.V.N.A.**			-.501	48.572	.619	-.367	.733	-1.840	1.106
positive re-evaluation	E.V.A.*	.595	.442	-.927	106	.356	-.599	.646	-1.879	.681
	E.V.N.A.**			-.887	53.053	.379	-.599	.675	-1.952	.755
putting in perspective	E.V.A.*	10.849	.001	-.301	106	.764	-.227	.755	-1.723	1.269
	E.V.N.A.**			-.258	43.480	.798	-.227	.880	-2.001	1.547
catastrophizing	E.V.A.*	6.267	.014	1.864	106	.065	1.196	.642	-.076	2.468
	E.V.N.A.**			1.682	47.460	.099	1.196	.711	-.234	2.625
blaming others	E.V.A.*	9.011	.003	1.747	106	.084	1.130	.647	-.153	2.412
	E.V.N.A.**			1.533	45.205	.132	1.130	.737	-.354	2.614

E.V.A. \* Equal variances assumed; E.V.N.A. \*\* Equal variances not assumed

Following the analysis of the data presented in Tables 13 and 14, we may conclude that:

- there are highlighted differences between the two people categories with respect to the anxiety level and the way coping mechanisms are activated, even if their values aren't that high;

- in the T significance test, presented in Table 14, the values obtained for the two people subgroups indicate some differences between the nine types of used coping mechanisms.

*Partial conclusion: Taking into account the data presented in Tables 13 and 14, we may appreciate that Hypothesis no. 5 is statistically grounded, mentioning that the two subgroups are not equal, which can be a source of error.*

In order to surmount this error and offer clarification regarding the significant differences with respect to anxiety manifestations in adolescents, based on gender, we resorted to the group equalization method, by excluding the results of each second female adolescent from the extended group (76 female adolescents).

Following the analysis of the data presented in Table 13, we could identify differences based on gender with respect to the anxiety level manifested by schoolchildren, with girls having higher values than boys; but with the T significance test, presented in Table 14, we notice that the significance threshold has the value of 0.37, which indicated that this difference is statistically unimportant.

### **The psychological intervention plan for preventing and/or reducing anxiety-specific manifestations in schoolchildren**

The most popular and widely-used strategies of psychological intervention for preventing and reducing anxiety-specific manifestations in schoolchildren are the cognitive-behavioral techniques.

In order to address anxiety issues in schoolchildren it is recommended at first to have a strategy of *cognitive-behavioral, psychosituational assessment* (Bersoff and Grieger<sup>4</sup>, 1971; Grieger and Abidin<sup>5</sup>, 1972; Grieger and Boyd<sup>6</sup>, 2006), followed by focusing the attention on the psychosituational perspective as a whole, and not just on the child, giving special attention to the mutual influences between the parent and the child. It comprises a thorough analysis of the child's claimed behavioral issues, including emotions and attitudes, as they are triggered and maintained by the behaviors and attitudes of the relevant people in their life. The strategy consists of three steps, namely:

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<sup>4</sup> D.N. Bersoff, & R.M. Grieger, II, *An interview model for the psychosituational assessment of children's behavior*. American Journal of Orthopsychiatry, 1971.

<sup>5</sup> R. Grieger & R.R. Abidin, Psychosocial assessment: A model for the school community psychologist in *Psychology in the Schools, vol 9, Issue 2* [https://link.springer.com/chapter/10.1007/0-387-26375-6\\_8](https://link.springer.com/chapter/10.1007/0-387-26375-6_8), 1972.

<sup>6</sup> R.M. Grieger & J.D. Boyd, Childhood Anxieties, Fears, and Phobias: A Cognitive-Behavioral, Psychosituational Approach. In: Ellis, A., Bernard, M.E. (eds) *Rational Emotive Behavioral Approaches to Childhood Disorders*. Springer, Boston, MA. [https://doi.org/10.1007/0-387-26375-6\\_8](https://doi.org/10.1007/0-387-26375-6_8), 2006.

Step 1. The cognitive-behavioral, psychosituational interview with the parents, considering the objectives (1) to collect enough information about the child, their issues and the parents' perspective on the issues; (2) to collect the information about the parents' role in triggering and/or maintaining the "issue"; (3) to discover the perceptual distortions, irrational attitudes and maladaptive behaviors of the parents; (4) to begin educating the parents in order to define and ultimately mitigate the issue.

Step 2: The cognitive-behavioral, psychosituational interview with the child, pinpointing the behaviors considered to be the result of the child's interactions with their significant environment. In this psychosituational setting, it is attempted to evaluate the child's personality variables and, also, the elements of their environment that precede and follow their behavior.

Step 3: The psychodiagnosis and setting objectives, particularly aiming at the role each party plays in the situational dilemma, which can be addressed either individually, or as a family, monitoring each family member's contribution regarding the perspective on the complexity of the issue, the acceptance of responsibility for their own actions, and what can be done to improve the individual or family wellbeing.

Later on, we apply the first working technique that offers a way of organizing thoughts, feelings, actions/ behaviors and helps identify (real) alternative solutions to the maladaptive behavior, considering to *define and operationalize the negative thoughts that trigger anxiety*, using the *Fears and worries chart* (Wells<sup>7</sup>, 1999; Ellis and Bernard<sup>8</sup>, 2007). It consists of a self-assessment chart on which the customer (schoolchild, parent/teacher) is required to write down their fears and worries.

The algorithm for clarifying what those negative thoughts mean to the child:

- verifying the evidence, by asking questions related to the veracity of the negative thoughts, and this way they will come to convince themselves that they don't have enough arguments to believe in them;
- analyzing the costs and benefits of maintaining the negative thought pattern;
- mentioning the counterarguments;

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<sup>7</sup> A. Wells, Cognitive Model of Generalized Anxiety Disorder, *Behavior Modification*, Vol. 23, Issue 4 <https://journals.sagepub.com/doi/abs/10.1177/0145445599234002>, 1999.

<sup>8</sup> A. Ellis & M.E. Bernard, *Rational-emotive and behavioral therapy in child and adolescent disorders*, Cluj-Napoca, RTS Publishing House, 2007.

- discovering alternative causes for various events;
- experiments of invalidating negative thoughts and beliefs.

Another working technique could be the cognitive-behavioral insight, that takes into account:

- the first task is to facilitate, both for the parents and the child, the insight necessary to make the change possible; for the parents, these insights bring about awareness that (1) their actions have negative consequences, significant for the child's adaptation in general and their anxiety issues in particular; (2) their own attitudes, ideas and beliefs are mainly responsible for their behaviors with the child; (3) some particular attitudes that they have about themselves and/or the child (for eg.: must = catastrophic) determines them to behave they way they do with the child; (4) these attitudes can be conceptually illogical, empirically unsupported and non-pragmatically to maintain; (5) adopting rational attitudes and behaviors on their side will have positive effects on the child's performance and adaptation; (6) they can give up on their defensive attitudes and can adopt other more constructive ones, if they are willing to invest time and energy to do so (Grieger *et al.*, 1980<sup>9</sup>, Grieger and Boyd, 1983<sup>10</sup>);

- later on, once the children see that there can be different solutions and that they can be learned, they are willing to explore the negative consequences of the problematic emotions and behaviors and the positive consequences which alternative solutions could offer.

This insight is made to motivate them to put effort for change. The key insight for children is that their own thoughts are the negative characters that cause their anxiety.

Lastly, we propose the technique called *generalized learning and training the abilities*, which brings to the forefront the fact that adults, but especially children manage to generalize what they have learned and to adopt rational beliefs that apply to similar issues in any situation.

In conclusion, the intervention on anxiety disorders in children typically embody the psychotherapeutic treatment of the entire family.

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<sup>9</sup> R. Grieger, D.J. Boyd & A. Ellis, *Rational-emotive Therapy: A Skills-based Approach* Editura Van Nostrand Reinhold Company, 1980.

<sup>10</sup> R.M. Grieger, & J.D. Boyd, *Rational-emotive therapy*. In H.T. Prout and D.T. Brown's (eds.), *Counseling and psychotherapy with children and adolescents: Theory and practice for school and clinic settings*. New York: Mariner Press, 1983.

## Conclusions

The research had the general objective to investigate the level of anxiety manifestations in adolescents, high schoolchildren, given the social economic, medical challenges, etc., that led to numerous changes in the education system, with an important psychological impact which demanded the need for family, school and specialized support in order to facilitate the adolescents' adaptation.

In the analysis of anxiety manifestation level in adolescents it was taken into account that there was a need to investigate the trends in the personality structure, the coping styles and the level of optimism, as well as to address anxiety manifestations based on gender.

The results of the research indicated the fact that schoolchildren with anxiety manifestations are introverts, have lower emotional stability and autonomy and a high level of conscientiousness, and these trends in the personality structure are also predictors for anxiety manifestations.

Moreover, some results showed that schoolchildren with anxiety manifestations use certain negative-effect coping mechanisms more frequently, such as self-blame, blaming others, catastrophizing, rumination and fewer mechanisms like positive re-evaluation, acceptance, putting in perspective, positive reappraisal and focusing on planning, which explains to a certain extent the occurrence of the aforementioned manifestations. Also, we call the attention to the fact that optimism influences the presence.

Generally, the results indicated the fact that most adolescents present anxiety manifestations that are considered normal, and only 8 of them (out of 108) can be considered subclinical, which means that interpretations rather take into account the anxiety manifestations with an adaptative bearing, of the vigilance type in a context of crisis and post-crisis, recommending them to accept an individualized psychological intervention program to reduce the risk for them to become anxious in the future.

The results of the research, even if they are extracted from the investigation of a small group of adolescents, demonstrates that, throughout almost 3 years of pandemic and given the psychosocial, educational challenges, etc. that they are facing, the interventions made by specialists from various fields have helped schoolchildren to adapt and have been useful for most of them to manifest a level of anxiety considered normal.

The reduces size of the group of adolescents who provided the data analyzed within the research represent the main limitation of this scientific

endeavor, which doesn't allow the extrapolation and generalization of the results at the level of the targeted population.

However, the obtained results and scientific evidence are promising, and the present research can be used as a pilot study for developing new investigative initiatives to analyze whether schoolchildren/ adolescents present anxiety manifestations or they have adapted optimally to the current changes.

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# BULLYING IN SCHOOL. A REAL PROBLEM FOR TEACHER - STUDENT - PARENT

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**Abstract:** *Bullying in schools is a serious problem that affects the well-being and academic success of students, as well as their relationships with teachers and parents. Teachers should talk to the students who engage in bullying behavior and their parents, as well as provide support and resources to the students who are being bullied. Parents can also talk to their children about the importance of kindness and respect, and encourage them to speak up if they witness or experience harassment. Students should speak to a trusted teacher, counselor, or parent and work together to develop strategies to deal with bullying. In conclusion, bullying in schools is a complex issue that requires collaborative effort among teachers, students, and parents. By working together to create a safe and supportive environment, we can help prevent bullying and ensure that students have the opportunity to succeed academically and emotionally.*

**Keywords:** *Bullying, school, collaboration, support, safe environment, wellbeing, relationships.*

## **Aggression in educational context**

Aggression and violence in and around schools have become a serious issue for students, teachers, and authorities. It is necessary to differentiate aggression, violence, and school violence. Aggressive behavior refers to any behavior, physical or symbolic, aimed at causing harm. Violence involves acute aggressive conduct, primarily using physical force. School violence includes various forms of aggressive and violent behavior, such as inappropriate expression, name-calling, harassment, teasing, mocking, threatening, hitting, and more, which are also subject to legal consequences<sup>12</sup>.

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<sup>1</sup> Albert Bandura and Richard H. Walters. *Social learning theory*. Vol. 1. Prentice Hall: Englewood cliffs, 1977.

<sup>2</sup> Timothy J. Beebe, Stephen E. Asche, Patricia A. Harrison, and Kathryn B. Quinlan. *Heightened vulnerability and increased risk-taking among adolescent chat room users: Results from a statewide school survey*. Journal of Adolescent Health 35, no. 2, 2004, 116-123.

School violence encompasses behaviors that are inappropriate, derogatory, and subject to legal action. Bullying and mobbing are two forms of aggression present in schools, involving persecution, domination, humiliation, intimidation, and psychological abuse of the victim. Bullying includes emotional and physical abuse, which can be repeated and have long-term effects on the victim. Mobbing refers to the psychological abuse of the victim by a group, often resulting in harassment, terrorization, blackmail, and degradation.

According to the specialized literature, the term "bullying" can be primarily defined in accordance with Olweus.<sup>3</sup> His definition encompasses three essential criteria. Firstly, bullying represents aggressive behavior or an intentional action to cause harm. Secondly, this behavior is repeated over time. Thirdly, interpersonal relationships characterized by bullying exhibit an imbalance of power. It is important to note that bullying can occur without a specific provocation and can be expressed through physical, verbal, or non-verbal means, such as physical contact, offensive words, obscene gestures, or intentional exclusion from a group. These forms include verbal behaviors (teasing, provoking, taunting, and gossiping), physical behaviors (hitting, pushing, destroying or stealing personal belongings, and persuading a friend to attack in one's place), and non-verbal/non-physical behaviors (threats, obscene gestures, exclusion from the group, manipulation of friendships, and threatening emails). This broader approach to bullying behavior has been made possible due to the increased interest and number of research studies in this field.

Considering these aspects, including the diversity of behaviors that can be included in the category of school violence, it is important to mention that bullying can be considered one of the forms of this violence. According to Olweus' definition (1991)<sup>4</sup>, bullying is characterized by the repeated and prolonged exposure of an individual to negative actions from one or more people. These negative actions consist of a deliberate intention to cause harm, insult, or provoke discomfort to another person.

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<sup>3</sup> Peter K. Smith, Richard Catalano, Josine Junger-Tas, Philip Philip Slee, Yohji Morita, and Dan Olweus, eds. *The nature of school bullying: A cross-national perspective*. Psychology Press, 1999, accesabil la:

[http://books.google.ca/books?id=Fj6i8AHNT5AC&printsec=frontcover&hl=ro&source=gbs\\_ge\\_summary\\_r&cad=0#v=onepage&q&f=false](http://books.google.ca/books?id=Fj6i8AHNT5AC&printsec=frontcover&hl=ro&source=gbs_ge_summary_r&cad=0#v=onepage&q&f=false) – accessed at 17.03.2023

<sup>4</sup> Dan Olweus, *Bully/victim problems among schoolchildren: Basic facts and effects of a school based intervention program*. The development and treatment of childhood aggression 17, no. 17, 1991, 411-448.

These negative actions can be expressed through physical contact, offensive words, obscene gestures, or the refusal to fulfill a request. It is important to note that the term "bullying" should not be used when the conflict arises between two individuals with approximately equal physical and psychological power. This information has been presented in Olweus' work and highlights the fact that bullying can be considered a specific form of school violence.

### **Factors which influence bullying**

There are several factors that contribute to bullying in the school environment, which can be categorized into two main categories: external factors (such as family or social environment) and factors related to the individual's personality. The causes of violence in the school environment need to be examined both outside and inside the school<sup>5</sup>.

Many violent students come from disorganized families or single-parent households. They face issues such as financial difficulties, major emotional traumas (such as the loss of a parent), domestic violence, alcohol consumption, lack of communication, lack of affection, absence of clear rules and freedom, etc. All of these can have serious consequences for both the family and the child, leading to a tendency to reject academic tasks and the demands of teachers.

Social and environmental factors also play a significant role in understanding bullying behavior in a child. These factors influence how children interact with their environment and can contribute to the development or perpetuation of aggressive behavior. Here are some social and environmental factors that may be characteristic of a child who engages in bullying:

- **Dysfunctional or abusive family:** Children who grow up in a dysfunctional or abusive family environment may be exposed to negative behavioral patterns and poor communication. They may learn that violence and aggression are acceptable ways to resolve conflicts and achieve their desires, which can contribute to engaging in bullying.
- **Negative influences from the surrounding environment:** Children can be exposed to negative influences at school, in the community, or through the media, which promote violence and aggressive behaviors.

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<sup>5</sup> Natalia Mihăilescu and Polina Lungu, *Aggression and violence in the school environment - a problem of the 21<sup>st</sup> century. Prevention and combating*. Scientific Annals of the "Bogdan Petriceicu Hasdeu" State University in Cahul, (9), 2013. 44-52.

These influences can normalize and validate bullying actions and affect how the child perceives and reacts to others.

- **Lack of adequate supervision and monitoring:** Children who lack proper supervision and monitoring from parents or adults may have more freedom to display aggressive behaviors without consequences. The lack of supervision can encourage the child to feel unencouraged or unpunished for acts of bullying.

- **Peer pressure and social acceptance:** The desire to fit into a particular group or be socially accepted can drive a child to engage in acts of bullying. Children may feel pressured to conform to group norms and resort to bullying to maintain or improve their social status within the group.

Acts of bullying can be influenced by several personal factors specific to the child who engages in them. These factors can play a significant role in the development and perpetuation of aggressive and intimidating behavior. Here are some personal factors that may contribute to a child engaging in bullying:

- **Trust issues and low self-esteem:** Children who have a negative self-image or feel insecure may attempt to boost their self-esteem by belittling others. They may choose bullying as a way to feel more powerful or important compared to their victims.

- **Aggressiveness and impulsivity:** Children with aggressive and impulsive traits may be more prone to engaging in bullying behavior. They may struggle with anger management and exhibit reduced empathy towards others, making them more likely to cause emotional and physical harm to other children.

- **Negative social circle:** Belonging to a group of friends that encourages or supports aggressive behavior can contribute to engaging in bullying. Children may imitate the negative behaviors of those around them and feel pressured to conform to the group's norms in order to be accepted.

- **Previous traumatic experiences:** Children who have gone through traumatic experiences such as physical or emotional abuse may develop a tendency to project their own pain onto others through bullying behaviors. They may seek power and control by hurting others as a way to cope with their own traumas.

- **Lack of empathy and social skills:** A lack of empathy and social skills can make it challenging for children to understand the negative

consequences of their actions on others. The absence of communication and conflict resolution skills can lead to the use of aggressive behaviors as a means to solve their problems or frustrations.

It is important to note that these personal factors do not justify bullying behavior, but they can help us understand why certain children resort to such actions. It is crucial to intervene and work with children involved in bullying to help them understand the consequences of their behaviors and develop appropriate skills for conflict management, empathy, and respect for others.

### **Bullying by gender and age**

Studies have been conducted to identify the relationship between bullying and the gender of students, boys or girls, and according to students' self-evaluations, it has been found that boys are more likely than girls to engage in aggression towards other students. The likelihood of both physical and verbal aggression towards other students is at least 1.5 times higher for boys than for girls<sup>6</sup>. In contrast to the findings of these studies, the results of a study conducted on students in Romania have shown that girls exhibited aggressive behaviors more frequently than boys<sup>7</sup>.

The psychology of gender differences examines the comparative study of average performances between girls and boys<sup>8</sup>. The differences can be explained by the societal expectation that girls should not display aggressive behavior but rather prosocial behavior. In the case of boys, there is greater societal tolerance towards aggression. Another explanation for the existing differences could be the ways in which boys and girls choose to manifest their aggression, which is one of the points of interest in this study.

Even from infancy, boys appear to be emotionally less stable than girls, exhibiting negative behaviors more frequently than girls. On the other hand, girls display more positive emotions, regulating their feelings

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<sup>6</sup> Herbert Scheithauer, Tobias Hayer, Franz Petermann and Gert Jugert. *Physical, verbal, and relational forms of bullying among German students: Age trends, gender differences, and correlates*. *Aggressive Behavior: Official Journal of the International Society for Research on Aggression* 32, no. 3, 2006, 261-275.

<sup>7</sup> Ioana E. Beldean-Galea, Ștefan I. Țigan, S.T.A.N. Cristian and Anca Dobrean. *Efficacy study of a primary intervention school violence program*. *Applied Medical Informatics* 31, no. 3, 2012, 47-54.

<sup>8</sup> Serge Moscovici, *Social consciousness and its history*. *Culture & Psychology* 4, no. 3, 1998, 411-429.

and affective states better<sup>9</sup>. According to Zahn-Waxler and collaborators in 1996<sup>10</sup>, girls exhibit better emotional regulation during the preschool period, which is an important factor explaining the lower frequency of violence among girls compared to boys. Girls develop aggressive behaviors during the onset of puberty but tend to prefer other forms of expression.

The terribleness of adolescence, emotional instability, personality traits ultimately lead to violent manifestations<sup>11</sup>. I believe it is important to approach this statement with caution and understand that there are many factors involved in violent behavior, and these can vary from individual to individual. It is true that adolescence is often characterized by experimentation, emotional development, and the search for identity. During this period, young people may be more prone to breaking norms and displaying rebellious or impulsive behavior. However, not all teenagers develop violent manifestations, and not all those who display violence have specific personality traits or emotional instability.

It is important to take into consideration other factors that can contribute to violent manifestations, such as the family environment, influence of peer groups, traumatic experiences, or exposure to violence in the media. Additionally, we must keep in mind that there are teenagers who, despite the challenges and difficulties of their age, manage their emotions and relationships in a healthy and non-violent manner. It is important to have an individualized approach and provide adequate support to adolescents in order to develop their skills in managing emotions and maintaining healthy relationships.

Regarding age, some studies have found that the frequency of bullying behaviors decreases as individuals get older<sup>12 13</sup>, while others

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<sup>9</sup> Katherine M. Weinberg and Edward Z. Tronick, *Emotional characteristics of infants associated with maternal depression and anxiety*. *Pediatrics* 102, no. 5, 1998, 1298-1304.

<sup>10</sup> Carolyn Zahn-Waxler, Marian Radke-Yarrow, Elizabeth Wagner and Michael Chapman, *Development of concern for others*. *Developmental psychology* 28, no. 1, 1992, 126.

<sup>11</sup> Adriana A. Conea, Cornelia Posa, *Violence in the school environment // Stop violence! Behavioral therapies*. National Symposium organized by the ASTRA County Library - October 21, 29, 2009. Project Coordinator: Cramarenco, C., Vasilca, E., Neagu, T., Marțian, O., p. 68.

<sup>12</sup> Maria Luisa Genta, Ersilia Menesini, Peter K. Smith, *The development of victimization in adolescence*. *Journal of Child Psychology and Psychiatry*, 1996, 37(6), 699-710.

<sup>13</sup> Tonja R Nansel, Mary Overpeck, Ramani S. Pilla, W. June Ruan, Bruce Simons-Morton, and Peter Scheidt. *Bullying behaviors among US youth: Prevalence and association with psychosocial adjustment*. *Jama* 285, no. 16, 2001, 2094-2100.

have shown a trend of increasing aggression from younger grades to older grades<sup>14</sup>.

As the transition from childhood to adolescence, middle school brings about a shift in aggressive behaviors. While the overt aggressive behaviors of childhood may decline, a different form of aggression persists, one that many researchers studying bullying tend to overlook. This particular form of aggression is closely associated with sexual bullying. While society appears to disapprove of young adults engaging in physical aggression (albeit with some tolerance), it does, however, allow males to exert their implicit power over females through sexualization. On the other hand, females adapt to societal expectations of passivity by resorting to more covert forms of bullying. In our society, aggression is commonly attributed to males, and thus, males adjust to a new paradigm that emphasizes dominance and control, manifested through sexualized and gender-specific bullying. For females, aggression (and bullying) is often seen as a means to acquire power, as power brings the promise of achieving equal status in the world or, at the very least, a reduced state of submission. Unfortunately, bullying does not diminish after middle school, contrary to what one might hope<sup>15</sup>.

### **Measures to prevent bullying**

To effectively prevent and combat school violence in the long term, it would be beneficial to implement a series of measures, such as: the establishment of a counseling and information office for parents; installation of cameras in schools; improving collaboration between parents and teachers; development of internal regulations in each class to sanction aggressive behavior; active involvement of psychologists in identifying factors that contribute to violence and reducing tensions among students; organization of courses for teachers to learn more about bullying, etc<sup>16</sup>.

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<sup>14</sup> Herbert Scheithauer, Tobias Hayer, Franz Petermann and Gert Jugert. *Physical, verbal, and relational forms of bullying among German students: Age trends, gender differences, and correlates*. *Aggressive Behavior: Official Journal of the International Society for Research on Aggression* 32, no. 3, 2006, 261-275.

<sup>15</sup> Mimi Yahn, *The social context of bullying*. *Encounter: Education for Meaning and Social Justice* 25, no. 4 (2012): 20-28.

<sup>16</sup> Georgiana Virginia Bonea, *The Aggression and Violence in Romanian Schools: Bullying and Mobbing*. *Quality of Life*. 30, no. 1 (2019): 59-75.

One of the prevention strategies in cases of bullying is creating a safe and supportive school environment, which involves the involvement of all stakeholders, including students, parents, teachers, and administrative staff, in promoting a positive environment. Schools should also develop and adopt clear policies and rules against bullying, which should be communicated to all members of the school community. Educating students, teachers, and parents about the nature, impact, and consequences of bullying is essential. Promoting empathy, developing nonviolent communication skills, and teaching healthy conflict resolution strategies can contribute to the prevention and reduction of bullying. Adequate supervision of students in school and outside of it can help prevent bullying incidents. Adults need to be vigilant and monitor the activities and interactions of students to intervene promptly in case of bullying situations<sup>17</sup>.

The study written by Merrell, Gueldner, Ross and Isava in 2008, titled „How effective are school bullying intervention programs?“, examines the effectiveness of bullying intervention programs in schools and identifies interventions that have shown the best results in reducing bullying. Among them are: the Olweus intervention program, which has led to a significant reduction in bullying cases and victimization in schools; the peer mediation program, which involves selecting and training older students to help younger ones resolve conflicts in a nonviolent manner; the social skills training program, which focuses on developing communication, empathy, and conflict resolution skills in students; the individualized intervention program, which involves tailored interventions and support for students involved in bullying; and the support group intervention program, which brings together groups of students who have been involved in or victimized by bullying, providing them with a safe space and emotional support to develop coping skills and learn healthy relationship strategies. The study concludes that programs that involve a comprehensive approach targeting both prevention and intervention, and that are based on the development of social skills and empathy in students, have shown the greatest effectiveness in reducing bullying in schools<sup>18</sup>.

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<sup>17</sup> Dan Olweus, *Bullying at school: What we know and what we can do*, Oxford: Blackwell Publishers, 1993.

<sup>18</sup> Kenneth W. Merrell, Barbara A. Gueldner, Scott W. Ross and Duane M. Isava. *How effective are school bullying intervention programs? A meta-analysis of intervention research*. *School psychology quarterly* 23, no. 1, 2008, 26.

In the article "Bullying in schools: The state of knowledge and effective interventions" written by Menesini and Salmivalli in 2017, several effective interventions in combating bullying are presented. Some focus on preventing and reducing bullying by addressing both the aggressors and the victims through student training modules, involving parents, and providing support for teachers. Others emphasize the importance of developing social skills and empathy in students to prevent and combat bullying. Additionally, some highlight the importance of involving parents and the community in bullying prevention and intervention efforts. Furthermore, others underscore the importance of implementing clear policies and rules against bullying and promoting values of respect and inclusion in schools<sup>19</sup>.

### **Empathy**

Research findings indicate that empathy levels are influenced by various factors such as age, gender, and education. Schieman and Van Gundy (2000)<sup>20</sup> and Endresen and Olweus (2001)<sup>21</sup> found that age and gender play a significant role in predicting empathy. Additionally, Spencer (2004)<sup>22</sup> and Alligood (2007)<sup>23</sup> observed that higher levels of education are associated with increased empathy. Overall, higher education, older age, and being female are linked to higher levels of empathy.

Empathy in school-aged children refers to their ability to understand and share the feelings of others. It plays a crucial role in their social and emotional development, as it helps them build positive relationships, show compassion, and navigate social interactions effectively.

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<sup>19</sup> Ersilia Menesini and Christina Salmivalli, *Bullying in schools: the state of knowledge and effective interventions*. *Psychology, health & medicine* 22, no. sup1, 2017, 240-253.

<sup>20</sup> Scott Schieman and Karen Van Gundy. *The personal and social links between age and self-reported empathy*. *Social Psychology Quarterly*, 2000, 152-174.

<sup>21</sup> Inger M. Endresen and Dan Olweus, *Self-reported empathy in Norwegian adolescents: sex differences, age trends, and relationship to bullying*. In: A.C. Bohart, C. Arthurand D.J. Stipek, eds. *Constructive & destructive behavior: Implications for family, school, & society*. Washington, DC: American Psychological Association, 2001, 147-165.

<sup>22</sup> John Spencer, *Decline in empathy in medical education: how can we stop the rot?.*, *Medical Education*, 2004, 38, 916-920.

<sup>23</sup> Martha Raile Alligood, *Rethinking empathy in nursing education: shifting to a developmental view*. In: C.L. Sieloff and M.A. Frey, eds. *Middle range theory development using King's Conceptual System*. New York: Springer, first edition, 2007, 287-296.

When it comes to gender differences in empathy, research suggests that girls tend to exhibit higher levels of empathy compared to boys. This difference may arise from a combination of biological, social, and cultural factors. Girls are often trained to be more emotionally expressive and nurturing, which may contribute to their higher empathy levels. Boys, on the other hand, may be learned to prioritize assertiveness and independence, which can impact their empathy development. However, it's important to note that individual variations exist, and not all boys or girls fit these generalizations. There are boys who display high levels of empathy and girls who may exhibit lower levels. It's essential to focus on nurturing empathy in all children, regardless of their gender, through education, emotional support, and promoting prosocial behaviors.

In educational settings, fostering empathy among school-aged children is crucial. Schools can incorporate empathy-building programs and activities that encourage perspective-taking, emotional recognition, and kindness. By promoting empathy in schools, children can develop essential social skills, enhance conflict resolution abilities, and create a positive and inclusive learning environment.

**Objectives:**

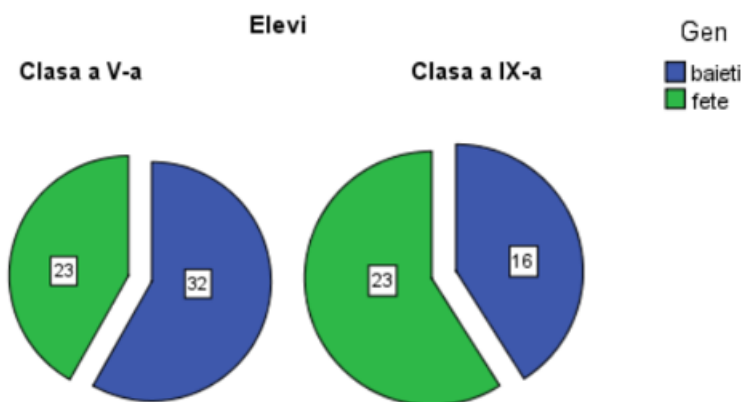
- Identify aggression styles based on gender and age.
- Determine the need for individualized psychological intervention based on age or gender categories.
- Develop a primary psychological intervention protocol for children exhibiting bullying behaviors.

**Hypotheses:**

1. There is a statistically significant difference between females and males regarding the level of aggression, with females being less aggressive than males.
2. There is a statistically significant difference between high school students and middle school students regarding the level of aggression, with high school students being less aggressive than middle school students.
3. There is a statistically significant difference between high school students and middle school students regarding the level of empathy, with high school students having a higher level of empathy than middle school students.

### Participants:

The participants in this study are elementary school students from the 5th grade and high school students from the 9th grade.



**Figure 1. Representation of students according to gender and class**

Figure 1 is an illustration of the studied group. From the category of primary school students, 23 of them are girls and 32 are boys, all from the 5th grade. From the category of high school students, I selected a sample from the 9th grade, consisting of 23 girls and 16 boys.

### Instruments:

To conduct this study, I utilized two questionnaires – one to measure the level and types of aggression and another to measure the level of empathy. Here is a brief description of the two tests:

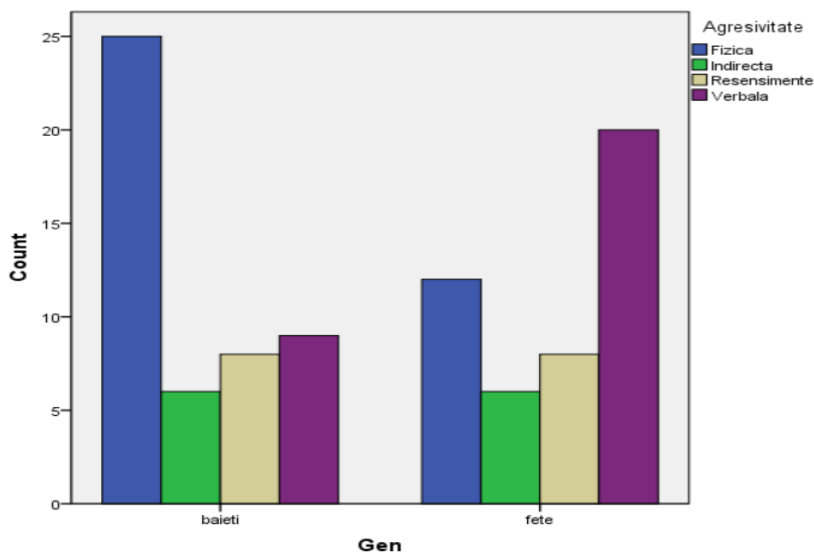
- The Buss-Dark Aggression-Hostility Questionnaire is a psychological instrument used to measure aggression and hostility levels in individuals. It was developed by Arnold H. Buss and Mark Perry Dark in 1992. The questionnaire consists of a set of items to which participants respond on a scale from 1 to 5, indicating the extent to which each statement applies to themselves. The items relate to thoughts, feelings, and behaviors associated with aggression and hostility.

- The Empathic Emotional Maturity (E.E.M.) Questionnaire is an instrument used to assess the level of emotional maturity and the ability to demonstrate empathy in individuals. It was developed by Adrian Neculau

and Iuliana Neculau in 2010. The questionnaire contains a series of items to which participants respond on a scale from 1 to 5, indicating the extent to which each statement applies to themselves. The items cover various aspects of emotional maturity and empathy, including the ability to recognize and understand one's own and others' emotions, respond appropriately to the emotional needs of others, and demonstrate compassion and altruism.

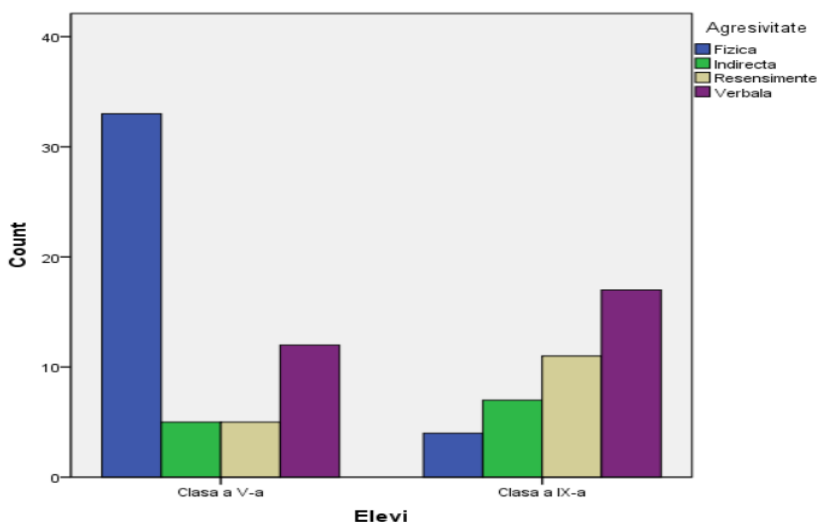
### Results and discussion

Before presenting the inferential statistical analysis for hypothesis testing, I would like to present two representative graphs for the study group.



**Figure 2. Representation of students according to gender and aggression**

In Figure 2, titled „Representation of Students by Gender and Aggressiveness”, the studied group is presented divided into two categories (girls and boys) based on the types of aggression observed (physical, indirect, resentment, verbal). In the boys' group the highest number of responses was recorded for physical aggression followed by verbal aggression. In the girls' group the majority of responses were allocated to verbal aggression followed by physical aggression. These findings underline the differences in the ways aggression manifests based on the gender of the students studied.



**Figure 3. Representation of students according to class and aggression**

In Figure 3, titled „Representation of Students by Class and Aggressiveness”, the studied group is presented divided into two categories (5th grade and 9th grade) based on the types of aggression observed (physical, indirect, resentment, verbal). In the 5th-grade students' group the highest number of results was recorded for physical aggression followed by verbal aggression. In the 9th-grade students' group the majority of responses were allocated to verbal aggression followed by resentment. These findings underline the differences in the ways aggression manifests based on the age group of the students studied.

1. There is a statistically significant difference between girls and boys in terms of aggression levels, with girls being less aggressive than boys.

Table 1

*Descriptive statistics of aggression index by gender of students*

Group Statistics				
Gen	N	Mean	Std. Deviation	Std. Error Mean
IG.AO baieti	48	25.3958	7.56459	1.09185
fete	46	21.8696	6.87543	1.01373

This table presents group statistics for a variable IG.AO (general aggression-hostility index), disaggregated by the gender of the subjects.

For the "boys" group, the number of subjects is 48, and for the "girls" group, the number of subjects is 46. The mean value (arithmetic mean) of the variable IG.AO is 25.39 for the boys' group, and 21.86 for the girls' group.

Table 2  
*Independent Samples t-test - Aggression index by gender*

		Independent Samples Test								
		Levene's Test for Equality of Variances		t-test for Equality of Means					95% Confidence Interval of the Difference	
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
IG.AO	Equal variances assumed	1.416	.237	2.362	92	.020	3.52627	1.49295	.56114	6.49139
	Equal variances not assumed			2.367	91.748	.020	3.52627	1.48989	.56710	6.48544

This presents table the results of the independent samples t-test comparing the two groups (girls and boys) based on the variable "IG.AO" (general aggression-hostility index). The statistical value of the t-test for comparing the means of the two groups is 2.36, with a p-value of 0.02, suggesting a significant difference between the means at a significance level of 0.05. The value of 3.52, representing the mean difference, is sufficiently large to support the existence of a significant difference between the two groups.

By considering the data from the two tables, we can conclude that the research hypothesis is accepted, indicating a significant difference between girls and boys in terms of aggression levels, with girls being less aggressive than boys.

2. There is a statistically significant difference between high school students and middle school students in terms of aggression levels, with high school students being less aggressive than middle school students.

Table 3  
*Descriptive statistics of aggression index by grade level of students*

		Group Statistics			
Elevi		N	Mean	Std. Deviation	Std. Error Mean
IG.AO	Clasa a V-a	55	25.8727	7.22151	.97375
	Clasa a IX-a	39	20.5641	6.58865	1.05503

The table presents group statistics for a variable IG.AO (general aggression-hostility index), disaggregated by the grade level of the students. There are 55 students from the 5th grade and 39 students from the 9th grade. The mean value (arithmetic mean) of the variable IG.AO is 25.87 for the 5th-grade student group, and 20.56 for the 9th-grade student group.

Table 4  
*Independent Samples t-test - Aggression index by grade level*

		Independent Samples Test									
		Levene's Test for Equality of Variances		t-test for Equality of Means						95% Confidence Interval of the Difference	
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper	
IG.AO	Equal variances assumed	1.921	.169	3.640	92	.000	5.30862	1.45848	2.41195	8.20530	
	Equal variances not assumed			3.698	86.265	.000	5.30862	1.43571	2.45465	8.16260	

The table presents the results of the independent samples t-test comparing the two groups (5th-grade students and 9th-grade students) based on the variable "IG.AO" (general aggression-hostility index). The statistical value of the t-test for comparing the means of the two groups is 3.64, with a p-value of 0.01, suggesting a significant difference between the means at a significance level of 0.01. The value of 5.30, representing the mean difference, is sufficiently large to support the existence of a significant difference between the two groups.

By considering the data from the two tables, we can conclude that the research hypothesis is accepted, indicating a significant difference between high school students and middle school students in terms of aggression levels, with high school students being less aggressive than middle school students.

3. There is a statistically significant difference between high school students and middle school students in terms of empathy levels, with high school students having a higher level of empathy than middle school students.

Table 5

*Descriptive statistics of empathy level by grade level of students*

Group Statistics					
Elevi		N	Mean	Std. Deviation	Std. Error Mean
Empatie	Clasa a V-a	55	43.6727	18.56924	2.50388
	Clasa a IX-a	39	47.2051	17.37236	2.78180

The table presents group statistics for a variable "empathy," disaggregated by the grade level of the students. There are 55 students from the 5th grade and 39 students from the 9th grade. The mean value (arithmetic mean) of the variable "empathy" is 43.67 for the 5th-grade student group and 47.20 for the 9th-grade student group.

Table 4

*Independent Samples t-test - Empathy level by grade level*

Independent Samples Test										
		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
Empatie	Equal variances assumed	.040	.841	-.933	92	.353	-3.53240	3.78579	-11.05130	3.98650
	Equal variances not assumed			-.944	85.174	.348	-3.53240	3.74270	-10.97368	3.90888

The table presents the results of the independent samples t-test comparing the two groups (5th-grade students and 9th-grade students) based on the variable "empathy." The statistical value of the t-test for comparing the means of the two groups is -0.93, with a p-value of 0.35, suggesting that there is no significant difference between the means of the two groups.

By considering the data from the two tables, we can conclude that the research hypothesis is rejected, indicating that there is no statistically significant difference between high school students and middle school students in terms of empathy levels.

### Conclusion

The present study revealed that boys exhibit a stronger inclination towards physical aggression, while girls are more prone to verbal aggression. This suggests the existence of gender differences in the manifestation of aggression based on its form.

Middle school students are more predisposed to physical aggressive behaviors compared to high school students, but at the same time, the level of verbal aggression remains relatively high. In contrast, high school students show a much higher tendency for verbal aggression compared to elementary school students. This may suggest a change in the mode of aggression expression as individual age.

The results of the present study highlighted a significant difference between boys and girls in terms of aggression levels, with boys displaying a higher level of aggression compared to girls. This discrepancy underscores the influence of gender factors on aggressive behavior.

Interestingly, this research demonstrated that high school students exhibit a lower level of aggression compared to middle school students. This can be attributed to cognitive and socio-emotional development as students progress through secondary education, where they can develop more effective conflict management and emotion regulation skills.

Additionally, we observe that both high school and elementary school students display a low level of empathy. This aspect may indicate the need to develop programs and interventions that support empathy development in the school environment, particularly during these critical socio-emotional developmental stages.

The results provide insight into aggressive behavior and empathy among students and can serve as a basis for developing interventions and educational programs aimed at promoting prosocial behaviors and healthy relationships in schools.

Taking into consideration the results and correlating them, I propose two personal development plans, one for elementary school students and one for high school students, with the main objective being the reduction of aggression and the acquisition of empathic skills.

The implementation of this personal development plan for middle school students should be coordinated by teachers, school counselors, and other professionals in the field of education:

- ✓ Anger and conflict management: Middle school students can benefit from a structured program that teaches them how to manage their anger and conflicts in a constructive manner. This may involve techniques for emotional calming, effective communication skills, and peaceful conflict resolution.

- ✓ Development of empathy and relationship-building skills: To promote empathy and understanding towards others, middle school students can engage in activities and exercises that help them see the

world through others' eyes. This can include storytelling, role-playing, or discussions about other people's experiences and feelings.

✓ Gender equality education and violence prevention: Considering the gender differences identified in the study and the importance of promoting healthy and non-violent relationships, middle school students can benefit from an education program that addresses gender equality issues and promotes violence prevention. This program can include discussions about gender stereotypes, mutual respect, and consent in relationships.

✓ Development of communication and conflict resolution skills: To help students express themselves appropriately and resolve conflicts in a peaceful manner, workshops or training sessions in communication and conflict resolution skills can be organized. This may include strategies for active listening, expressing feelings constructively, and finding collaborative solutions.

✓ Promotion of a positive and inclusive school climate: To create a safe and supportive school environment, efforts can be made to promote a positive and inclusive school climate. This can involve anti-bullying campaigns, peer mentoring programs, and activities that encourage collaboration and mutual support.

✓ Counseling and emotional support: Middle school students can benefit from counseling and emotional support services to help them manage their emotions and cope with school-related stress and pressures. This can include individual or group sessions with specialized school counselors.

Given the results of this study and the characteristics of high school students, here is an adapted personal development plan for this age group:

✓ Development of communication and negotiation skills: High school students can benefit from programs and activities that help them develop effective communication and negotiation skills in various contexts. This may include workshops on non-violent communication, role-playing for conflict resolution, and practicing constructive argumentation techniques.

✓ Promotion of critical thinking and decision-making: To support their development of critical thinking and decision-making skills, high school students can be engaged in activities that provide opportunities for analyzing and evaluating information, exploring different perspectives, and making informed decisions.

✓ Development of problem-solving competencies: High school students can benefit from structured programs that help them develop problem-solving skills. This can include practical exercises for problem identification, generating solutions, and evaluating outcomes. Additionally, emphasis can be placed on effectively managing stress and academic pressures.

✓ Promotion of socio-emotional development: High school students can be supported in developing socio-emotional competencies such as emotional management, understanding and expressing empathy, and establishing and maintaining healthy relationships. This can be achieved through socio-emotional education programs, counseling and emotional support, as well as volunteering and community involvement activities.

✓ Promotion of health and well-being: High school students can be encouraged to take care of their physical and mental health through programs that promote a healthy lifestyle, such as regular physical exercise, balanced nutrition, and stress management. Additionally, support can be provided for developing healthy sleep habits, managing screen time, and seeking help for mental health concerns.

The implementation of these personal development programs for all categories of students is of utmost importance as they aim to develop socio-emotional skills (such as empathy, effective communication, and conflict resolution), increase self-confidence and self-understanding (referring to emotions, needs, and aspirations), prevent and reduce negative behaviors (by learning to manage conflicts constructively, express opinions and emotions in a healthy way, and develop relationships based on respect and mutual understanding), and last but not least, improve the school climate and enhance academic performance (by creating a conducive environment where students feel motivated, engaged, and supported in the learning process).

Personal development programs are essential in education, providing students with the tools and resources necessary to develop their social, emotional, and decision-making skills, as well as to build healthy relationships and reach their full potential. The implementation of these programs should be a priority to ensure harmonious development.

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# ELECTRONIC DICTIONARIES: EVOLUTION AND CLASSIFICATION

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**Abstract:** *The article deals with the phenomenon of the development of electronic lexicography and the problem of classifying electronic dictionaries. Findings reveal, that Among researchers, there is no single opinion on the content, scope and features of the basic concept of electronic lexicography because electronic dictionaries are a relatively new phenomenon, which has evolved over several decades from machine-readable dictionaries and exact copies of paper editions to complex digital lexicographic systems with a wide arsenal of functions. Modern electronic dictionaries tend to hybridize, often combining alphabetic and thematic ways of organizing material, lexical and encyclopedic information, which complicates the possibility of distinguishing clear differential features of a particular lexicographic resource and cruelly assigning it to one or another type. The plurality of criteria for comparing dictionaries complicates the construction of a unified general classification of dictionaries of different types, and a multidimensional characterization of a particular dictionary can be carried out using the facet method using the basic list of parameters, which remains open and can be replenished with the development of the system of lexicographic resources.*

**Keywords:** *electronic lexicography, electronic dictionary, lexical resource, classification, criterion.*

## Introduction

One of the urgent issues facing modern lexicography is overcoming the "Babylon syndrome" associated with multilingualism – a problem that has become more acute in the era of globalization and requires powerful and flexible lexicographic tools for its solution, which is emphasized by many researchers. As Amelina & Tarasenko note, at the current stage of the development of the translation industry, the effectiveness of the tasks of the translation process largely depends on the use of specialized tools based on information technologies<sup>1</sup>.

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<sup>1</sup> S.M. Amelina & R.O. Tarasenko, "Studying technologies for creating electronic terminological bases in the process of professional training of translators", *Information Technologies and Learning Tools*, vol. 60, no 4, 2017, p. 105.

The intensive development of computational lexicology and electronic lexicography in Ukraine is due to the needs of both scientific (objectification of research, creation of a local base of factual material, convenient and fast information search, optimization and rationalization of philologist professional activity), and extra-scientific (satisfaction the demand of a wide range of users for adapted, objective and reliable linguistic information in the form of electronic dictionaries of various types)<sup>2</sup>.

At the same time, the analysis of the real situation in the modern market of lexicographic products, allows us to state the contradictions between the needs of users for high-quality electronic dictionaries and the lack of digital tools for the translation of both general and special vocabularies. The shortage of terminological dictionaries is particularly acute.

The problem of determining the status of an electronic translation dictionary lies in the area of the intersection of two directions of lexicography: computational and translational, and requires the involvement of conceptual ideas each of them.

Today, electronic (computational) lexicography is a multifaceted field, which, according to Shirokov, is an applied scientific discipline on the border of linguistics and computer science, which studies the ways and techniques of applying the methods of information science and technology in the theory and practice of designing a wide range of lexicographic systems – on the one hand, and the branch of the computer industry, which is developing due to the fact that the lexicographing of knowledge is one of the effective ways of its detection and distribution – on the other hand<sup>3</sup>.

In a narrow sense, electronic lexicography is understood as an applied discipline in linguistics that studies methods, technology, and specific methods of using computer technology in the theory and practice of compiling dictionaries.

### **History of the development of electronic lexicography**

The origin and development of electronic lexicography, or more precisely computational lexicology, are associated with the appearance of machine-readable dictionaries, in which information is in electronic form and could be processed and manipulated computationally<sup>4</sup>.

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<sup>2</sup> V. Baloh, "Current state of Ukrainian computer linguistics", *Lexicographic bulletin*, no 11, 2005, p. 28.

<sup>3</sup> V.A. Shirokov, *Computer lexicography*, Kyiv, Naukova dumka, 2011, p. 4.

<sup>4</sup> K.C. Litkowski, *Computational Lexicons and Dictionaries. Encyclopedia of Language and Linguistics*, 2nd ed., Oxford, Elsevier Publishers, 2005.

Computers began to be used in lexicology in the 1960s. One of the editors of the Random House Dictionary of the English Language, Urdang, developed a database system for categorizing and sorting dictionary information, calling it a "dataset"<sup>5</sup>. At the same time, the System Development Corporation's lexicographic project created magnetic tape versions of Webster's 7th New Collegiate Dictionary and the New Merriam-Webster Pocket Dictionary. Initially, machine-readable dictionaries were exact copies of paper-based ones, and researchers spent a lot of time interpreting typing codes. As technology has advanced, publishers have separated print components and dictionary databases. Advances in technology in the 1970s contributed to the wider use of computers in lexicographic projects. Computerized compilation systems were used to sort and check entries in the Longman Dictionary of Contemporary English, considered the first truly computerized dictionary, and the Collins English Dictionary.

Nesi in the history of the development of electronic dictionaries identified the stages of creating machine-readable dictionaries, handheld electronic dictionaries, dictionaries on disks and online dictionaries. As soon as computers began to be used in the creation of dictionaries, electronic companies began to work on the development of pocket-sized handheld translation gadgets. The first electronic dictionaries with user interfaces (LK-3000 and Craig M100) were technically the descendants of portable electronic calculators and personal digital assistants.

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<sup>5</sup> H. Nesi, "Dictionaries in electronic form", *The Oxford History of English Lexicography*, Oxford, Oxford UPress, 2008, p. 458.

<sup>6</sup> Ibidem.

Traditionally, a distinction is made between first-generation "partial-content" electronic translators, which contained only a certain part of words and definitions of printed dictionaries, and second-generation "full-content" devices, which provided full texts of printed dictionaries, including example sentences. The development of compression and decompression technologies has made it possible to store and integrate a growing number of full-text dictionaries.

Unlike expensive portable devices usually intended for private use, disks were relatively cheap, and with a license, the dictionary can be installed on many different computers or distributed over a local network, which is a definite advantage for their use in educational institutions. Among the first CD-ROM dictionaries were Oxford English (1988) Dictionary the Longman (1993) and Collins COBUILD (1995) interactive English and American dictionaries, which included not only a dictionary but also guides to English phonetics and grammar.

Subsequently, the Internet became another centre for the storage of information. At first, publishing houses that invested a lot of money in the designing of dictionaries did not want to distribute their products on the Internet for free. The increase in the number and quality of online dictionaries has been partly explained by a change in the policy of publishers who have begun to charge for their own online products or use them as marketing tools to encourage the purchase of a book, CD or electronic access to the text (Oxford English Dictionary Online, Cambridge Dictionaries Online, etc.). It has become common practice for many publishing houses to offer their own dictionaries in various forms: paper, disks, online. The use of high-speed broadband technologies in 2000s increased access to information for many ordinary users<sup>7</sup>.

Another trend in the development of online dictionaries was the creation of multi-functional multilingual dictionaries of arbitrary content, such as Wiktionary. The first Wiktionary (aimed at describing all words in all languages) was created in English in 2002, and dictionaries in other languages were created according to its scheme. As of 2023, the Ukrainian section of Wiktionary contains 54,026 articles.

Despite the positive aspects of the democratization of the dictionary, Wiktionary is not listed as a very reliable and authoritative source among translators, although, as stated in the concept, during its compilation, data

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<sup>7</sup> H. Nesi, *op. cit.*

from previous dictionaries and corpora of real texts are used as the main sources.

So, at first, computers only assisted in the process of compiling dictionaries, then they contributed to the transfer of paper information to a computer and, finally, became the basis for compiling electronic dictionaries "from scratch".

In Ukraine, the development of electronic lexicography dates back to the 80s of the XX century: although research in this direction was carried out earlier. Traditionally, the All-Union Conference on the Problems of Creating a Machine Fund (1983), which was attended by well-known Ukrainian researchers from the Institute of Linguistics and the Institute of Cybernetics (V. Glushkova V. Perebinyis, M. Peshchak, I. Beletskaya) is considered the starting point, as well as the approval of the Program of the State Committee for Science and Technology of the USSR for the creation of machine funds of the languages of the peoples of the USSR. As part of this program, scientists of the Lviv Polytechnic Institute developed the "Slovo" system to support multilingual terminological dictionaries.

After Ukraine gained independence, the development of electronic lexicography was determined by the processes of the country's integration into the world information community – on the one hand, and the implementation of the state language policy – on the other. The main task was to create a national dictionary base.

According to Kupriyanov<sup>8</sup>, the pioneer in this field was the Ukrainian Lingua-Information Fund of the National Academy of Sciences of Ukraine, founded in 1991, where basic models of computer lexicography were created, which laid the foundation for the development of appropriate technologies and series of lexicographic works of a new generation was launched (in particular "Dictionaries of Ukraine" in accordance with the Decree of the President of Ukraine dated August 7, 1999 "On the Development of the National dictionary base").

"Dictionaries of Ukraine" in the updated version 4.1 consists of five dictionary modules, corrected and expanded: "Word inflection", "Transcription", "Synonymy", "Antonymy", "Phraseology", and its general register contains about 268 thousand words.

The Lingua-Information Fund of the National Academy of Sciences of Ukraine also offers resources such as: "Interpretive Dictionary of the

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<sup>8</sup> E.V. Kupriyanov, "Computer lexicography as a problem of modern linguistics (historical aspect)", *V.N. Karazin Kharkiv National University Bulletin*, no. 53, 2008, p. 12.

Ukrainian Language in 20 Volumes", "System of Linguistic Interaction "VLL", "Ukrainian National Linguistic Corpus", "Dictionary of the Ukrainian Language edited by B.D. Grinchenko", "Ukrainian Biographical Archive", "Ukrainian-Crimean Tatar dictionary", virtual lexicographic systems "MONDILEX" and "Turkic", virtual lexicographic laboratories, etc.

A powerful link of computer lexicography is the Department of Structural and Mathematical Linguistics of the Potebnia Institute of Linguistics of the National Academy of the Sciences of Ukraine, whose specialists developed a computer morpheme and word-form fund of the Ukrainian language and a system for automated editing of scientific text. As stated on the official website, the department is currently working on the research of innovative processes in the modern Ukrainian language, their computer modelling, the study of the influence of sociodynamics on the system and structure of the language, trends in language changes, the most important projects are: the development of linguistic and algorithmic support for automatic processing systems information, the creation of a database on the structure of modern Ukrainian words and the development of means of automated compilation based on it of new types of Ukrainian dictionaries. So, "Inverse frequency dictionary of modern Ukrainian artistic prose", "Dictionary of affixal morphemes of the Ukrainian language", "Root nest dictionary of the Ukrainian language", "Active resources of the modern Ukrainian nomination: Ideographic dictionary of new vocabulary", "Electronic grammar dictionary Ukrainian literary language" have already been compiled.

The latter dictionary is a joint project with the Computer Linguistics Laboratory of the Institute of Philology of Taras Shevchenko National University of Kyiv. Among other products of this laboratory: Frequency dictionaries of Ukrainian literary prose, journalism, modern poetic language, Morpheme-syllabic database of the Ukrainian language, Grammatical dictionary of Ukrainian verbs, program for the automatic synthesis of English noun and verb paradigms. Currently, the laboratory is conducting research on the principles of English-Ukrainian and Ukrainian-English machine translation, developing translation and terminological dictionaries, and programs for the analysis and synthesis of human speech.

Other commercial organizations also create software products for editing and translation. Trident Software has developed the Language Master and Pragma product lines based on its own multilingual translation technology. The latest version is Pragma 6.x for Ukrainian,

English, German and other languages, which has a total of 56 translation directions.

As Sobkowiak, Schryver note, “the direction in which electronic lexicography is moving is exactly this: towards more content, more flexibility and customisation, more user-friendliness, better access and more connectivity with other sources of knowledge, lexicographic and beyond”<sup>9</sup>.

### **Classification of electronic dictionaries**

Among researchers, there is no single point of view regarding the content, scope and features of the electronic dictionaries.

Nesi believes, that the term electronic dictionary can be used to refer to any reference material stored in electronic form that gives information about spelling, meaning, or use of words<sup>10</sup>.

According to Pervanov, the long-term opposition of paper and electronic dictionaries overshadows the fact that the text (image) and the medium are unrelated entities, and he does not see the fundamental difference between an electronic dictionary and a paper one in electronic markup and hypertext, cards and windows instead of paper pages and dictionary articles, as in a new way of lexicographic interpretation of language semantics, which involves the user to virtual lexicography in a completely different way<sup>11</sup>.

This idea is shared by other scientists, studying the evolution of lexicography from a dictionary-book to modern multimedia databases, which increasingly expand the capabilities and volume of electronic sources of information and bring them closer to depositories of thesaurus-type information, as similar as possible to the way of storing information about words in a person mental lexicon. Modern electronic dictionaries are flexible interactive system that provides access to information of the most diverse nature, which goes far beyond the boundaries of purely linguistic knowledge.

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<sup>9</sup> Gilles-Maurice de Schryver, “Lexicographers’ dreams in the electronic-dictionary age”, *International Journal of Lexicography*, 16(2), 2003. Available at:

[https://www.researchgate.net/publication/31424125\\_Lexicographers'\\_Dreams\\_in\\_the\\_Electronic-Dictionary\\_Age](https://www.researchgate.net/publication/31424125_Lexicographers'_Dreams_in_the_Electronic-Dictionary_Age)

<sup>10</sup> H. Nesi, *op. cit.*

<sup>11</sup> Ya. A. Pervanov, Notes on electronic lexicography, 2011. Available at: <http://arxiv.org/ftp/arxiv/papers/1107/1107.1753.pdf>

In this paper, we define an electronic dictionary as an electronic reference edition stored on electronic media or network, which contains an ordered list of linguistic units with information on their meaning, use, structure, origin, or (and) translated into another language, and which cannot be transformed into paper analogue without reducing its functions.

The feature "cannot be transformed into a paper analogue without reducing its functions" is important for distinguishing between the concepts of "electronic dictionary" and "electronic analogue of a printed dictionary". After all, it is quite common to think that an electronic dictionary is an electronic version of a paper dictionary, equipped with a convenient search system.

Selegey has the opposite view and believes that the electronic dictionary is a special lexicographic object that can implement many productive ideas that are not in demand in paper dictionaries for various reasons. The researcher points out the following antinomies of traditional paper dictionaries:

- 1) the larger the volume of the dictionary, the more difficult it is to use;
- 2) the fuller description of lexical meanings, the less the dictionary meets the modern linguistic and cultural situation;
- 3) the more interesting the lexicographic concept of the dictionary, the smaller its lexical base<sup>12</sup>.

The computer realization of the dictionary allows us to overcome part of the mentioned problems, due to the improved possibilities of displaying the content of the dictionary entry (for example, with a partial display by different criteria – different "projections" of the dictionary), various graphic tools, linguistic technologies, such as morphological analysis and parsing, full-text search, sound recognition and synthesis, etc.

Forget states that electronic dictionaries differ from paper ones in such factors as use, presentation, search capabilities, technical aspects, and nature of the content. The author draws attention to the use of hypertext in electronic dictionaries and greater search flexibility compared to paper dictionaries<sup>13</sup>.

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<sup>12</sup> V. Selegey, *Electronic dictionaries and computer lexicography*. Lingvo Lexicographers' Association, 2003. Available at: [http://www.lingvoda.ru/transforum/articles/selegey\\_a1.asp](http://www.lingvoda.ru/transforum/articles/selegey_a1.asp)

<sup>13</sup> Forget, N., *Les dictionnaires électroniques dans l'optique de la traduction*, Ottawa, University of Ottawa, 1999.

Kudashev also notes, that an electronic dictionary provides the possibility of a non-linear presentation of material, and the order of arrangement of dictionary entries can be changed according to the wishes of the user. Electronic dictionary programs also allow you to customize the interface, it can also be integrated with other applications: text editors, translation memory systems, desktop publishing systems, which significantly speed up the exchange of information and its processing. If the reasonable limit of the volume of an interpretive paper dictionary is about 500-600 thousand dictionary entries, then for a multilingual dictionary this figure is even smaller. The practical limit of the number of information categories in a paper dictionary is about ten to fifteen parameters, and the considerable capacity of electronic media allows you to abandon the strict economy of dictionary space<sup>14</sup>.

Sazhenin refers to the characteristics of electronic lexicographic resources as a larger volume of lexicographic data, an integrated description of a lexical unit and the possibility of operating with content elements: correction, formation of the user's own content and creation of a system of complex queries<sup>15</sup>.

According to Pastor & Alcina, of all the differences between electronic and paper dictionaries, the main one, is the way the user accesses the information in a dictionary. The possibilities of searching in paper dictionaries are limited by the arrangement of the content by the lexicographer. Electronic dictionaries have more advanced search methods, such as: search in entries, similar to alphabetical search in paper dictionaries, assisted and advanced search, search with wildcards and filters, etc.<sup>16</sup>

Therefore, most researchers consider their volume, non-linear structure and extended search capabilities to be the fundamental advantages of electronic dictionaries. The non-linear nature of hypertext makes it possible to organize information in the form of a branched structure, which allows you to significantly expand the boundaries of a dictionary entry and solve the problem of limited information. Also,

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<sup>14</sup> I. S. Kudashev, *Designing translation dictionaries for special vocabulary*, Helsinki, HU Print, 2007, p. 156.

<sup>15</sup> I.I. Sazhenin, *Corpus methods in lexicography: experience in designing a model of the vocabulary corpus*, Doctoral dissertation, Novosibirsk, NGPU, 2013.

<sup>16</sup> V. Pastor & A. Alcina, "Search techniques in electronic dictionaries: a classification for translators", *International Journal of Lexicography*, 23 (3), 2010, p. 307.

scientists point out such advantages of electronic dictionaries: flexibility, reversibility, dynamism and multiplicity.

There is no single generally accepted classification of electronic dictionaries, they are classified according to various criteria in the scientific literature<sup>17</sup>.

Lehr proposes a typology of electronic dictionaries based on two criteria: technical and (meta)lexicographic. According to technical criteria, dictionaries are online and offline. The online dictionaries are divided into a pocket and personal computer dictionaries, among which there are dictionaries on CDROM, floppy disks and other storage devices. In the (meta)lexicographic aspect, electronic dictionaries based on paper versions and new ones specially developed, as well as print appearance and innovative appearance are distinguished<sup>18</sup>.

This opinion is shared by other researchers. Mysak proposed a classification of electronic dictionaries by medium and distinguishes: 1) computer dictionaries (stationary, portable, online); 2) pocket dictionaries; 3) mobile dictionaries<sup>19</sup>.

Schryver<sup>20</sup> proposed a three-step typology of dictionaries, relevant to the questions "WHO accesses WHAT WHERE?"

The first step answers the question "WHO accesses the dictionary?" and distinguishes NLP (natural language processing) lexicons, human-readable dictionaries and lexicons for NLP and humans.

The second step answers the question "WHAT is accessed?" i.e. a key point is a dictionary medium. One can differentiate between a physical-object and an electronic medium. Both these media can be further divided into handheld devices and robust machines.

And the third step answers the question "WHERE?" Among handled human-oriented electronic dictionaries scientist distinguishes stand-alone ones (PEDs, reading pens, or lexicons supporting text-messaging in phones) and networked ones on mobile disks.

The robust-machines human-oriented electronic dictionaries differ in the same criteria on stand-alone ones (dictionaries are stored on various

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<sup>17</sup> O. Yu. Balalaieva, "Classifications of electronic dictionaries", *International Journal of Philology*, vol. 12, no 2, 2021, p. 60.

<sup>18</sup> A. Lehr, "Electronic Dictionaries", *Lexicographica*, 12, 1996, p. 315.

<sup>19</sup> R. Mysak, "Computer dictionaries: classification and compilation", *Problems of Ukrainian terminology: Proceedings of the international scientific-practical conference*, Lviv, 30/09–20/10/2008, p. 52.

<sup>20</sup> Gilles-Maurice de Schryver, *op. cit.*

types of disks CD-ROM, DVD, hard disk, etc.) and networked dictionaries: intranet ones (dictionaries which are only accessible on a local area network of corporations, libraries, universities, etc.) and internet ones (dictionaries available worldwide, stored on servers accessible on the Internet).

Thus, answering the questions “WHO accesses WHAT WHERE?”, the researcher gives the following paradigm:

- traditional paper dictionary: one user uses a handheld book to access a dictionary stored on paper;
- handheld electronic dictionary: one user uses a palmtop to access a dictionary stored on a small disk;
- robust-machine dictionary: one user uses a laptop/desktop to access a dictionary stored on a large disk;
- Intranet dictionary: a group of users use laptops/desktops to access a dictionary stored on a local mainframe;
- Internet dictionary: users worldwide use laptops/desktops to access a dictionary stored on an online server<sup>21</sup>.

According to some scientists, the same classification parameters can be applied to electronic dictionaries as to traditional printed dictionaries. For example, Kameneva <sup>22</sup> developed a classification of electronic dictionaries by several criteria such as:

- number of dictionary entries: large, small, and concise dictionaries;
- number of languages: monolingual dictionaries (educational, encyclopedic, explanatory, etymological, onomastic, dictionary of foreign words) and translation dictionaries (bilingual, multilingual);
- vocabulary coverage: special, explanatory, encyclopedic, orthographic dictionaries, thesaurus;
- way of presenting information: paper and electronic dictionaries;
- functional orientation: functional and branch (thesaurus, terminological, thematic, scientific), functional-linguistic (combinatorial, dictionary of collocations), functional-figurative (phraseological, dictionaries of idioms, phrasal verbs);
- order of presentation of lexical material: alphabetical, reverse, sequential presentation of dictionary entries;

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<sup>21</sup> Ibidem.

<sup>22</sup> N.A. Kameneva, “Computer lexicography and compilation of electronic dictionaries”, *Philology. Issues of theory and practice*, no 3 (45), 2015, p. 86–89.

- cultural orientation: onomastic, dictionary of regional studies, dictionary of literary norms;
- volume of linguistic information: linguistic, encyclopedic;
- purpose of the dictionary: educational, information retrieval, bibliographic;
- synchronic and diachronic aspects: historical, non-historical, etymological;
- relation to language norms: normative (normative grammar, dictionary of normative language), regulatory (normative grammar), non-normative.

Although this classification correlates with traditional ones and makes it possible to classify dictionaries according to several criteria, some oppositions, in our opinion, are inconsistent. The opposition of linguistic and encyclopedic dictionaries is traditional for lexicography, but the criterion here is not the volume of linguistic information, but the object of description in the dictionary (concepts and realities of the surrounding world – in the encyclopedic, language units – in the linguistic).

Another opinion regarding the possibility of applying uniform classification parameters to paper and electronic dictionaries is held by Shirokov, according to whom the accepted distinction of traditional dictionaries by volume – large (full, integral), small (selective, short), medium and thesaurus – is not relevant for computer dictionaries and lexicographic databases, although it is traditionally used in their names<sup>23</sup>.

Sazhenin <sup>24</sup> classifies electronic dictionaries by three criteria: morphological (characterizes the resource on its form, location and purpose), content (characterizes the resource on content features), and technical (characterizes the resource on technical tools).

According to the first criterion, the researcher distinguishes resources: online – non-online, dictionary – shell (specialized software that allows you to create dictionary databases and operate on).

According to the second criterion, these resources are distinguished: integrative (a resource that does not use its own database, but searches the

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<sup>23</sup> V.A. Shirokov (ed.), *Linguistic and information studies: Proceedings of the Ukrainian Lingua-Information Fund of the National Academy of Sciences of Ukraine*, vol. 3: Interpretive lexicography, Book 1: Dictionary of the Ukrainian language in twenty volumes, Kyiv, Ukrainian Lingua-Information Fund, 2018, p. 17.

<sup>24</sup> I.I. Sazhenin, *op. cit.*

databases of other online lexicographic sources) and proprietary (uses its own dictionary database hosted on the product developer's server).

According to the third criterion, the key features are different types of search (word-by-word, full-text, alphabetic, phrase), morphological analysis, illustrative material, listening, scanning a fragment, the possibility of independent replenishment of the dictionary base, the possibility of forming complex queries, etc.

Zavarueva<sup>25</sup> classifies electronic dictionaries by four criteria: form, linguistic characteristics, prototype, possibility of feedback to the user.

In terms of form, there are online dictionaries and autonomous dictionaries on CDs and other electronic media.

According to linguistic characteristics, dictionaries are divided into text and hypertext dictionaries, which can be non-creolized and creolized (contain extra-linguistic elements: images, audio illustrations, video fragments, etc.)

Electronic dictionaries may or may not have a paper prototype. The first is divided into identical to the prototypes and different from them, and the second is into interactive and non-interactive.

Kuprijanov<sup>26</sup> tries to combine both approaches and proposes to classify electronic dictionaries:

1) by conventional parameters:

- vocabulary (general-purpose or special-purpose dictionaries),
- number of languages (monolingual, bilingual and multilingual dictionaries),
- purpose (translation, explanatory dictionaries etc. or complex dictionaries);
- adherence to language norms: (dictionaries of literary or spoken language);

2) by criteria peculiar only to computer lexicography:

- linguistic (textual and hypertextual dictionaries, with hypertext linking the
- entries and outer language resources);

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<sup>25</sup> I.I. Zavaruyeva, "On one possible classification of electronic dictionaries", *V.N. Karazin Kharkiv National University Bulletin, Series Philology*, no 765, 2007, p. 67-70.

<sup>26</sup> E.V. Kuprijanov, "Electronic dictionary classification as problem of modern computer lexicography", *V.N. Karazin Kharkiv National University Bulletin, Series Philology*, no 1152, 2015, p. 46-49.

- dichotomy “paper dictionary – electronic dictionary” (based on a paper dictionary and newly developed);
- availability of terms used in one or several areas in the case of terminology dictionaries (dictionaries containing terms to be used in single or several areas);
- information form: textual dictionaries, audio dictionaries and video dictionaries.

In our opinion, it is worth agreeing with those researchers who believe that the multiplicity of criteria for comparing dictionaries complicates the development of a single general classification of dictionaries of different types; and the multifaceted characteristics of a specific dictionary can be ensured by its specification using facet methodology<sup>27</sup>.

### **Conclusion**

Among researchers, there is no single opinion on the content, scope and features of the basic concept of electronic lexicography, because electronic dictionaries are a relatively new phenomenon in the market of lexicographic products, which have evolved over several decades from machine-readable dictionaries and exact copies of paper editions to complex digital lexicographic systems with a wide arsenal of functions and features.

Modern electronic dictionaries tend to hybridize, often combining alphabetic and thematic ways of organizing material, lexical and encyclopedic information, which complicates the possibility of distinguishing clear differential features of a particular lexicographic resource and cruelly assigning it to one or another type. The plurality of criteria for comparing dictionaries complicates the construction of a unified general classification of dictionaries of different types, and a multidimensional characterization of a particular dictionary can be carried out using the facet method using the basic list of parameters, which remains open and can be replenished with the development of the system of lexicographic resources.

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<sup>27</sup> O. Yu. Balalaieva, “Facet classification of e-learning tools”, *Information Technologies and Learning Tools*, vol. 38, no 6, 2013, p. 41.

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# ETHICS OF ROUSSEAU'S PHILOSOPHY OF EDUCATION

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***Abstract:** Jean Jacque Rousseau's conception of early childhood education indispensably, inevitably and reasonably indicates the values of child freedom in learning, and proposes the needs of respecting the freedom of the child in attempt to be formed and developed along his or her interests in contributing the development of the society he or she belongs. Outside this moral consciousness, the philosophy of Rousseau's early childhood education calls to question the roles of the human persons in the development contents of the society in relation of curriculum contents of child mental formation, and this, Rousseau examines the directedness of early childhood education with three main concerns as principles: the Principle of Negative Education; Methods of Teaching; and the Aims of Education. Such ethical conception of child development projects that child has the right and freedom to be formed along what he or she likes being dependent on the dictates of natural law and principles, not what the society wants the child to be or study by the curriculum that is rudimentary to societal values, away from the personal values and capacities. Adopting evaluative mode of analysis therefore, the essay concludes that the ethical imports of Rousseau's early childhood education as a basis of contemporary educational philosophy in promoting child-centred curriculum and learning, where personal potentialities and creativities of learners can be fully harnessed along the respect of natural law and freedom. With this, there are bound to be an healthy and vibrant society where integral freedom with real sense of responsibility is allow to be exercised from early stage of human development through education.*

***Keywords:** Human Formation, Ethics, Rousseau, Early Childhood Education, Philosophy of Education*

## Introduction

It is a living fact that every philosopher is greatly influenced by the prevailing situation of their time, and Jean Jacque Rousseau (Born on the

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28<sup>th</sup> June, 1712, Died on the 2<sup>nd</sup> July, 1778) is an exception to this development, especially in the philosophy of human formation and developmental psychology through educational theories and ideologies. With this conception of development, Rousseau conceived the level of illiteracy and the need to promote justice and fairness in his time, and to many followers, the situation surrounding his birth might have made him to have great concern and regard for human person, and held to esteem the value for educational systems.<sup>1</sup> It was greatly observed by many of academic followers and disciples, that throughout his life, he kept returning to the thought that people are good by nature but they have been corrupted by society and civilization. To many other thinkers, Rousseau did not mean to suggest that society and civilization are inherently bad but rather that both had taken a wrong direction and become more harmful as they became more sophisticated.

Understandably, Rousseau's philosophy of education is partly rooted in the stoic philosophy that emphasizes the prime importance of nature in understanding the whole of the human person.<sup>2</sup> Rousseau's conception of child learning formation and development through education recognizes the *ethics of living* which suggests that the formation in learning should be based on the respect of natural law and principles.<sup>3</sup> Hence, one of his main focuses was the goodness of human person and with which, he essentially emphasizes the needs to educate our children in the right direction, as to have them become good citizens to the society, but not through adoption of the negative education by the society on the child, only through allowing the child to exercise his or her freedom in learning along his or her best ability and capacity.<sup>4</sup> He never relegated the vital role of education in forming children into good adulthood. For Rousseau, the interest of the sovereign is not contrary to that of people and the sovereign

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<sup>1</sup> J. Bruner, *The Process of Education*, Cambridge: Harvard University Press, 1960, p. 15.

<sup>2</sup> M.M. Uzomah and P.O. Isanbor, *Philosophies and Theories of Education*, 2<sup>nd</sup> ed. Kaduna: Eizy, 2019, pp. 261-262.

<sup>3</sup> The education of the self should be seen on the relevance in rationally adopting the ontologised ethics of living for the development of oneself in relations to the otherness of existence. Such ethics recognizes the oneness in existence through the theory of participation and authenticity following the philosophy of Karol Wojtyla's phenomenology of the Acting Person, See this analysis in: I.P. Aghaosa and P.O. Isanbor, Human Person and the Metaphysics of Education. *EUROMENTOR: Journal Studies About Education*, Vol. XII, No. 4, 2021, pp. 49-60.

<sup>4</sup> G.E. Ogbenika, *A Discourse on Democracy: Western and African Perspectives*. BC: Mindex Publications, 2019, p. 23.

is not a single body rather but a whole association considered as a body. It is on these grounds that this paper seeks to explore Rousseau's philosophical thoughts on education and educational processes using the methodology already spelt out above.

### **Basis of Educational Philosophy of Jean Jacque Rousseau**

Fundamental to Rousseau's philosophy of education is the assumption that there is one developmental process common to all humans. It is an intrinsic, natural process of which the primary behavioral manifestation is curiosity. This curiosity itself derives from the very fact that the child is born weak and is lacking in many crucial aspects. With this conception, he developed five stages of development: infancy (one to five years)<sup>5</sup>, childhood (five to twelve years)<sup>6</sup>, early adolescence (twelve to fifteen years),<sup>7</sup> late adolescence (fifteen to eighteen years)<sup>8</sup>, and adulthood (twenty years and above).<sup>9</sup>

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<sup>5</sup> The infancy stage begins from birth and ends at the child's fifth year. This is a tactile stage. It is important that the educator puts no restriction on his way. Here education is by sensation. It comes from the five sense organs. He or she learns from sense experiences. The rational faculty has not been developed. Hence, no guilt should be input to him or her for he or she is not responsible for his or her actions for the sense of morality is not yet developed. The educator sees that the child does not form any habit for any formed at this stage will be difficult to change later. Eating, speaking, and walking happen almost at once. This ends the infancy.

<sup>6</sup> This stage comes after infancy and ushers one into adolescence. The sense of judgment develops. If nature is judiciously followed, at twelve he or she begins a childish way of reasoning. It has been obvious that Rousseau advocates that a child should be trained as such before he or she becomes an adult. The young *Emile* has changed in stature and in behavior from what he used to be at infancy. The code of conduct is also more mature. The *Emile's* behaviour is an expression of his self-originated ideas. Truly *Emile* has come to the apex of his or her childhood and through nature he or she obtains all that is necessary at his or her age.

<sup>7</sup> This is a stage when the child is about entering adolescence; a time when the energy in him or her supersedes the demand he or she makes on it. He grows faster in powers and agility but yet sexual passions are still dormant. Hence the tutor should be more careful in regulating what goes into him or her and the time too giving only what nature approves to be good and useful. With this the ideas of morality, utility, and choice of trade are gradually given to him. There is a shift from sensation to ideas. The tutor should suggest mind-agitating questions. Such gets the child thinking, thus sharpening his or her reasoning faculties. If he or she asks the tutor any question, the tutor should carefully avoid providing the answer for him or her. Clear, distinct and simple words are still used in communicating objects that the child can see. Passion is close at hand at this stage.

<sup>8</sup> Adolescent stage ushers one into adulthood. The change is not fixed by nature. At infancy, the tutor's work has been like a child's play. Now it is not the case. He is now

The foundation of Rousseau's educational philosophy is on the ethics of human rights. Ethics is a systematic approach to understanding, analyzing, and distinguishing matters of right and wrong, good and bad, and admirable and deplorable as they relate to the well-being of and the relationships among sentient beings.<sup>10</sup> Moral philosophy includes systematizing, defending, and recommending concepts of right and wrong behavior. Therefore, one ought to decide on decision based on his or her ethical decision. With this operational conception of ethics, Rousseau propounds the principles of his educational philosophy mostly in his book *Emile*, and it is mostly based on his three main principles which are: The Principle of Negative Education; Methods of Teaching; and the Aims of Education.<sup>11</sup>

**The Principle of Negative Education:** With this, Rousseau strongly criticized the formal education system which was prevalent in the society. He was of the opinion that formal education was against the nature of the

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conscious of himself and can study his relationships with his fellow. Good self-esteem is to be formed too and subsequently the formation of moral knowledge. If a child of nature trained up to this age applies what he has learnt; helping the poor; giving justice to the oppressed and sympathizing with the discomfited he will certainly acquire knowledge through experience. At this stage there is a development of passion. Sex education is taught to the child. Rousseau advises that if your child asks you of issues concerning sex you should be careful and honest: "It is better to tell the child to be quiet than to answer with a lie. But if an answer has to be given, it should be given with perfect simplicity with no mystery or embarrassment and not even a smile."

<sup>9</sup> This is when *Emile* has grown up. He is now capable of bringing a species of his kind into existence. Hitherto, *Emile* through natural education has been controlled by ignorance which the tutor deliberately left him with. Thus, Rousseau suggests that what remains is to instill in him some elements of moral responsibility. He must know his actions and its implications through the tutor. In teaching him, he should not be left in solitude, idleness, in company of females. These groups constitute danger for him. He should be distracted with some engagements: "What he requires is a new occupation that will interest him by its novelty and absorbed his thoughts completely." To this effect, Rousseau suggests hunting. This does not mean that *Emile* should be a perpetual hunter but to navigate the dangerous passion. The tutor later initiates the idea of marriage in his. From this idea *Emile* is introduced properly into the society. Being a natural man, he feels more comfortable when people take no notice of him, not concerned about people's prejudice and not attracting notice.

<sup>10</sup> Peter Singer, *Practical Ethics*. Cambridge: Cambridge University Press, 1993, p. 29.

<sup>11</sup> See, the conception of the formation and development of the human person as an agent of societal change and cohesion through education and politics, to be seen as the foundation of the philosophy of social contract theories, in (J.J. Rousseau, *Emile*. London: Dent, pp. 5-17).

child.<sup>12</sup> As the opening lines of *Emile* suggests, he held the view that everything is good at the hands of the author of nature, but it degenerates in the hands of the human person as a learner. It is society that makes a child to be seen as bad element by providing him or her negative education and to be recommended as a remedy to protect children from the evils of the society.<sup>13</sup> Hence, negative education does not teach a child the value of truth and virtue; and on the other hand, it preserves the heart from vice and mind from error. Rousseau was against teaching children moral values before they become capable of understanding it. The negative education he proposed prevents a child against the evils of life rather than injecting values from that he or she doesn't understand. So, negative education should be the first education of a child. Rousseau recommended it throughout childhood, that is, till the child becomes 12 years of age. Negative education doesn't teach the children virtue; it protects them from vice. It doesn't teach truth; only it protects them from error.<sup>14</sup>

Negative education approach will make the child choose the path of truth when he comes of age to understand it. **The major characteristics of negative education are:** 1. It allows the child to move freely in nature so that he is able to perfect the sensory organs of his or her body; 2. Children will be kept away from all forms of formal education. The child should learn and develop himself in the lap of nature. Till he becomes 12 years he doesn't require a formal tutor; 3. In negative education children will be encouraged to lose their time by engaging in various kinds of physical activities; 4. It doesn't give any place to books in the first few years of development; 5. Negative education will help to inculcate natural habits in children rather than a strict regime of habit formation; 6. Negative education discarded the idea of direct moral education. A child's mind is not mature enough to receive direct and positive moral education. A child should be taught morality through the natural consequences of his or her own actions; 7. Negative education is based on direct observation, experience and learning by doing. No traditional methods of teaching are encouraged in negative education; 8. It gives importance to a child's

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<sup>12</sup> T. Sooter, Early Childhood Education in Nigeria: Issues and Problems. *Journal of Educational and Social Research*, Vol. 3, 2013, p. 170-180.

<sup>13</sup> E. Dhammei, "Jean Jacques Rousseau: Educational Philosophy of Jean Jacques Rousseau," Online Note Bank, last modified 2022.

<https://onlinenotebank.wordpress.com/2022/01/15/educational-philosophy-of-jean-jacques-rousseau/>.

<sup>14</sup> E. Dhammei, *Ibid*.

individuality. So education should be based on a child's interest, rather than adopting a common pattern for all.<sup>15</sup> Hence, Rousseau rejected positive education since there is too much stress on verbalism, duty, social education, morality, religion, strict discipline and on the formation of habits. But, in negative education, the child is allowed to learn by following his or her natural impulses.

**Methods of Teaching:** From above concerns, it is obvious that the teaching methods of formal education were rejected by Rousseau because he believed they would lead to the suppression of natural tendencies in a child. So as part of his educational philosophy, he suggests a number of teaching methods which will serve as alternatives to the methods of formal education. They include; **Direct Experience and Observation:** Rousseau believed that direct experience and observation will enhance the development of sense organs and reasoning capacities.<sup>16</sup> He recommended that children should acquire experience before expression and objects before words. He discouraged bookish knowledge and gave emphasis to knowledge gained through experience. These ideas are best expressed in his own words "Let the child learn nothing from books which they can learn from experience".<sup>17</sup> **Learning by Doing:** Rousseau was a great advocate of practical education rather than the theoretical one. He held the belief that knowledge gained through doing is permanent compared to that gained through words. Since long lectures decrease a child's interest to learn new things, he should be allowed to act for himself.<sup>18</sup> **The Play Method:** Rousseau emphasized the importance of play in the development of young children. They should be allowed to play freely in a way that enhances their physical and cognitive development. A young child doesn't know the difference between play and work. Hence exploring the environment through play is the best education for him.<sup>19</sup> And, **Heuristic Method:** This method prepares children to become researches and discoverers. An interest to find new things is kindled in children through heuristic methods. Rousseau recommended this method of discovery and problem solving in education.<sup>20</sup>

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<sup>15</sup> E. Dhammei, *Ibid.*

<sup>16</sup> T. Sooter, *Early Childhood Education in Nigeria: Issues and Problems*, p. 176.

<sup>17</sup> E. Dhammei, *Ibid.*

<sup>18</sup> E. Dhammei, *Ibid.*

<sup>19</sup> E. Dhammei, *Ibid.*

<sup>20</sup> E. Dhammei, *Ibid.*

**Aims of Education:** The development of a child's inner faculties and powers is the primary aim of education. This development should happen in a natural way. Education should help a child to remain alive. Life is not a mere act of breathing, but it involves work, development of sense organs, proper utilization of various parts of human body, and the development of various powers of the body.<sup>21</sup> Education should aim at making a child a real human being. With this, Rousseau identified the following as the major aims of education: 1. A strong body is necessary for a child to grow into a healthy and wholesome personality. A feeble body makes a feeble mind. Hence physical development should be an important aim of education; 2. Development of senses is another chief aim of education in the early years. Senses of human body act as gateways of knowledge. So education should help a child develop and train his senses; and 3. Development of the innate faculties of a child in a natural way and in natural setting forms another aim of education. This helps him to establish a harmony between nature, objects and himself. Hence, Rousseau considered intellectual development as an important goal of education. In order to achieve it, a child should be trained in physical sciences, mathematics, geography, history and language. Also, that education should ultimately prepare a child to face life and earn for his or her living. Teaching him or her some mechanical art, trade or manual labor should be another aim of education.<sup>22</sup> These methods and aims of learning propounded by Rousseau indicate that the role of a teacher in the process of education is secondary. To him, a teacher is not an instructor, but a guide who inspires the child to explore his innate faculties.

### **Rousseau's Contribution and its implication to Child Educational Development and Personality Formation**

Rousseau discovered and recognized the childhood traits. He advocated basis of child psychology as the founding step for education of children, and this leads to child-centred education in the modern period. He was the forerunner of modern educational psychology.<sup>23</sup> He said that children should be treated as children and not as young adults, so methods of providing them education should be different. He said that the children should be given problems to solve without any help and

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<sup>21</sup> Cf, G. Gutek, *Philosophical, Ideological, and Theoretical Perspectives on Education*, p. 25.

<sup>22</sup> E. Dhammei, *Ibid.*

<sup>23</sup> G. Gutek, *Philosophical, Ideological, and Theoretical Perspectives on Education*. 2<sup>nd</sup> Ed. NY: Pearson, 2014, p. 10.

instructions. Therefore, let them find out the truths themselves by exploring the environment. With this, Rousseau laid the foundation of free and positive discipline.<sup>24</sup> He condemned the punishment which destroys original and natural curiosity and intellect of the child due to fear of punishment. He was against strict discipline enforcement on children. He was in favour of providing full freedom to children to do their work in their own creative ways and not interfering in what they are doing. Hence, Rousseau's contributions on early childhood education lead to further implications to the educational system and development in the developing nations, especially in the Third World countries. The government has many responsibilities to carry out in training a child as long as natural education is concerned. Some ideas from Rousseau's conception of natural education can be adopted in their national educational system which has faced with many challenges.

The first challenge is the proliferation of Early Childhood Institutions. It is provided that the government should encourage individuals to have private childhood institutions but it is becoming rampant. Virtually schools are sited everywhere with little or no adequate provision of requirement for proper education. It is not just that, many proprietors of these schools are businessmen who have no skills, training, nor knowledge concerning education. Their major aim is financially oriented. If this is the case, can they give what they do not have? Since their major focus is on how to make gain, there will be inadequate funding and provision of equipment and infrastructure for proper learning. Their target would mainly be on how to guide students on examination malpractice and get good grades. Through this means they advertise their school for upcoming students. As the number of student increases, the facilities are neither changed nor augmented nor updated.

On another hand, the teachers must lead an exemplary life: "Be virtuous and good yourselves, and the examples you set will impress themselves on your pupils' memories, and in due season will enter their hearts."<sup>25</sup> The character, in some cases, teaches more than words. The issue that brings about the poor education system is the employment of

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<sup>24</sup> P.O. Isanbor and G.O. Ojebun, Ethics of Educational Measurement and Evaluation for Integral National Development. *FALSABA: Journal of Philosophy*, 3(1), 2020, pp. 39-57, P.O. Isanbor and G. E. Ogbenika, 'Education for All' (EFA) Philosophy, Human Right to Education and the Quest for Sustainable National Development. *Anyigba Journal of Arts and Humanities*, Vol. 13, No. 8, 2019, pp. 232-247.

<sup>25</sup> Rousseau, *Emile*, 46.

untrained and unqualified teachers. Teaching is now seen as the last hope of human's survival. Those who are endowed with sound knowledge go after more lucrative professions. Some will no longer have time to prepare his or her lessons for the pupil because he/she will be engaged in one business or the other since the amount he or she receives as salary cannot serve him/her and the household till the next month. Since education determines the future situation of a nation, it should be taken seriously. Employment of good teachers would result to good student and good leaders of tomorrow. Adequate funding would stop incessant industrial action by teachers. It will also minimize the rate of examination malpractice because some see that period as means to enriching their pocket. If they have enough, the tendency to indulge in that hopefully would drastically be reduced.

Furthermore, Rousseau took *Emile* round different fields of life: to a carpenter, on tourism, to a gardener, etc. This was just in attempt to savor them all. In the same token, the educational curriculum should give children the necessary opportunity and freedom to decide what they will be in life. When Rousseau says that children should be allowed to experience challenges at younger age it was to get them prepared to overcome challenges in future and to be able to make their decision. It is disheartening that young adults and some fully grown adults cannot make decisions. A critical look at those people's past may reveal that they were always under the surveillance of their parents. They never associated with their mates to play and have childhood experiences. Putting it clearly Rousseau says: "Leave his essential character full liberty to manifest itself, in order to get a better view of his whole personality."<sup>26</sup> This gives the individual as a person and as a learner the freedom of choice and it is in the choice of these objects and in the constant care taken to put before him or her the things he or she can know and hide from him or her the things he ought not to know that the art of memory training consists.

### **Ethics of Rousseau's Philosophy of Education**

The *ethics of living* associated this philosophy of education is centred on the fact that for a child to remain pure, innocent and uncontaminated by societal factors, Rousseau recommends that when such a child reaches school age, such a child should be separated and kept apart, whereby he or she would not be corrupted. He or she should be allowed to practice

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<sup>26</sup> J.J. Rousseau, *Emile*, p. 42.

whatever pleases him/her. Subsequently, when he/she is judged to have been matured, he or she would be re-introduced into the society. One finds greatest happiness whenever one is asked to do what one has the desire to be doing always. Natural education is poised to achieve this conviction. It is a form of education that is based on talent-hunting objective.<sup>27</sup> The education that is the best is the one that takes into consideration one's inclination. This type is the one that agrees to one's area of competence. This is because one is led to discover, nurture and fine-tune one natural endowment.<sup>28</sup> His revolutionary work, *The Emile*, is a veritable *vademecum* for all educationists and for all who have good interest in the nation's future because children of today are leaders of tomorrow. However, despite the concrete practical steps and the goals to be achieved through Natural education, there are some inconsistencies and some thoughts that may not be fully realized in this 21<sup>st</sup> century.<sup>29</sup>

The major ethical objective for going after natural education is to avoid the influence of the society already corrupt by the effect of civilization. Corruptions and corruptions are products of the society where the individual as a learner needs to struggle over such societal challenges before striving to learn the positive and systematic contents of knowledge. Rousseau, in trying to avoid contact with social institutions, advocates natural education whereby a pupil lives a solitary life in which he is put and trained in a secluded place: "*Emile*, after being protected from socialization in his childhood..."<sup>30</sup> But it is a known fact that human beings are social animals. The human person is ontologically made such that he or she cannot live alone. He or she is born within a community and therefore should live and relate with people—a kind of dependency. Rousseau's education can be said to be one-sided. Secondly, this Rousseau's position stands to undermine the importance of socio-cultural values that are to be inculcated in children at their tender age. Far from

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<sup>27</sup> T. Sooter, *Early Childhood Education in Nigeria: Issues and Problems*, p. 177.

<sup>28</sup> P.O. Isanbor, Education for All (EFA) as Nigerian Philosophy of Education: a Futuristic Consideration. *African Journal of Studies in Education*, 10 (1), 2015, pp. 205-224; P. O. Isanbor and G.E. Ogbenika, 'Education for All' (EFA) Philosophy, Human Right to Education and the Quest for Sustainable National Development. *Anyigba Journal of Arts and Humanities*, 13(8), 2019, pp. 232-247.

<sup>29</sup> I.A. Kanu and P.O. Isanbor, Philosophy of Idealistic Education for the Realization of Integral Humanism. *Ochendo: An African Journal of Innovative Studies*, 2 (1), 2021, pp. 222-234.

<sup>30</sup> J.J. Rousseau, *Emile*, p. 170.

being so, education is a means through which societal values, behavioural patterns and other human aspects of life are inculcated in one. This cultural values help to determine the world-view of a society. The child needs to have important knowledge of his, at least, immediate environment.

Rousseau posits that the actions and decisions of *Emile* should come from his or her reasoning and not from any authority. If he or she is allowed to take decisions concerning morality, then there will be cases of moral relativity. If this, then what about social norms which are used in guiding the society? In Rousseau's opinion, the child should not be disturbed with learning how to read until he or she is twelve years and above. He sees reading as "the chief cause of unhappiness to them...the greatest plague of childhood."<sup>31</sup> But this does not help them in my own view. This can also be gleaned from Rousseau's emphasis on not bothering the children with reading. Had *Emile* known how to read he would have honoured the invitations from his or her father and friends "to a dinner, a walk, a boating party, or some public entertainment."<sup>32</sup> If he or she is not allowed to read can he communicate with anybody outside his or her area in future because words are the vehicle through which inner feelings and thoughts are conveyed? The educational systems (education through play and education through gifts and occupation) can be of help in this regard.

Furthermore, if we are to go by Rousseau's position, it means that children should be left to discover their abilities by having a first experience, that they should not be prevented from experiencing many things. Then, what about harmful objects such as fire, sharp knife, etc.? Since curiosity is to be aroused and nourished but no answer will be given, what about forming a wrong answer or concept? It is possible that in trying to find solutions to puzzles of life the child may develop wrong knowledge which takes extra effort to be corrected.<sup>33</sup> To this, one may argue that Rousseau has provided a solution when he says that the environment should be free from furniture and by implication all objects both harmful and precious such as ceramics, breakable utensils, etc. But if we are to go by that, how would the child know what the object is and its function? However, Rousseau still provides the solution to these issues

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<sup>31</sup> J.J. Rousseau, *Emile*, 51.

<sup>32</sup> J.J. Rousseau, *Emile*, 52.

<sup>33</sup> T. Sooter, p. 177.

which appeals most to me. For him, it will perhaps be essential to give him or her assistance as little as possible, and appearance of it be avoid. The whole doctrine of natural education may not be realizable but a reasonable aspect of it can be adopted. It can be adopted for child-centered education. It will still create avenues for children to have challenging experiences that will bring out what is embedded and undiscovered in them. This exposition can show that natural education may not be fully realized but some aspects can be adapted to a reasonable extent. Rousseau knows the challenges that his educational theory will possibly encounter.<sup>34</sup> To cap it up, he reaffirmed that the child after receiving natural education may not be the best, wisest among his or her peers.

### **Conclusion**

From the foregoing, the values of early children education based on the operation of the human freedom on the exercises on one's natural values in Rousseau's philosophy of education has been examined, especially the ethics of living inherent in such philosophy. This is not without its shortcomings, especially the proposed possible adoption of such philosophy which allows the child to develop with formal education until 12 years, and the freedom to allow to choice his or her learning based on his or her values and capacity. Despite these seemingly shortcomings in the natural education as propounded by Rousseau, it can be adapted in our educational system and in training an individual. It shows the value inherent in giving children freedom of association, bodily freedom, freedom to play around, etc. This freedom gives children the forum to have experience that would definitely shape their life and world view. Rousseau points out the necessity of getting children close to nature. In the same token, one will enjoy all the parents and guardians living in urban areas especially in Third World nations, from time to time, to take their children to their home town to the learn the values of nature in order to shape their vales of true professionalism. They have more opportunities to associate with their peers and play around, having first hand encounter with nature. Indeed, Rousseau has made a tremendous progress and has given a guide for anybody who wishes to train a formidable personality.

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<sup>34</sup> J.J. Rousseau, *Emile*, 42.

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# THE CORRELATION BETWEEN ETHICAL PEDAGOGICAL INTELLIGENCE AND EDUCATIONAL STYLES IN THE FAMILY

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***Abstract:** There are few things that make a child feel better than being treated by their parents as an intelligent, thinking person. Likewise, when children are treated as if they are important and intelligent, it is surprising how capable, clever and full of ideas they really are. In this context, educational styles in the family play an important role. At the same time, parents are also influenced in their children's education by ethical pedagogical intelligence, which, in turn, is required to be developed through a transcendental Methodology for the formation of ethical pedagogical intelligence.*

***Keywords:** educational styles in the family, parenting style, family style, ethics pedagogy, ethical pedagogical intelligence, parent education.*

Currently, the rapid pace at which everything is happening, including career advancements, new technologies, and constant changes, has a significant impact on individuals, especially on working parents. This impact is even more pronounced for parents who are also employees themselves.

In the midst of all the rapid changes happening in careers, new technologies, and the multitude of changes surrounding us, it's crucial that families receive maximum support. This includes implementing laws that facilitate the care and education of children, so that parents can choose to be both employees and parents in a harmonious combination. Being a parent is probably the biggest responsibility an adult can have, as it can have a great impact on children for many generations. However, no one is born with the talent to be a good parent, and we all start as amateurs. It's important to remember that a child raised without enough love tends to search for it all their life, rather than strive to realize their potential. Parents always want the best for their children - they want them to be happy and healthy.

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The prevalence of children growing up feeling unloved is a bewildering issue. Why do parents fail to provide the love their children need to grow up healthily? Another significant problem is that parents often fail to realize that their child is a reflection of their upbringing and education. With the stress and busyness of life, many parents fail to recognize that kindergarten and school are not enough to help their children develop into well-rounded individuals. Conflicts between parents and children often stem from different parenting styles, adding to the problem.

To address this problem, it's important to identify ways to leverage different parental styles to improve children's education and overall family quality. Parental skills and social skills are key reference areas for improving personal efficiency in family education. By facilitating optimal communication and relationships with their children, parents can ensure their children's integration into society while also promoting self-knowledge and self-actualization for both adults and children.<sup>1</sup>

Encouraging successful family education can be achieved through both counseling and education, which are part of socio-educational intervention. This intervention involves a set of measures that support families and improve intra-family relations in favor of children's education. Counseling is a human services profession that involves individual or group sessions aimed at personal development, crisis support, psychotherapy, and problem-solving. When it comes to educating parents, the focus is on developing effective communication and interaction practices in the family to exercise their educational function. The specialized literature identifies two approaches, parental style and family style, which can explain how adults adapt or struggle with daily challenges. Analyzing both approaches together can help understand the adaptive or maladaptive ways parents respond to the demands of family life.

According to Ioana Druiu, parental style refers to the set of behaviors and emotions that parents exhibit towards their children, and the way in which they approach the parent-child relationship. Parental styles are defined based on two main elements, namely the degree of emotional warmth and the degree of control exercised over the child. These two

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<sup>1</sup> Apud L. Mocanu, N. Carabet, *Parental education: Course support*. Chisinau, Typogr. UPS I. Creangă, 2020, 57 p., pp. 27-31.

elements determine five main parenting styles: authoritarian, permissive, uninvolved, overprotective, and democratic.<sup>2</sup>

Some researchers,<sup>3</sup> emphasize that understanding parental styles is crucial for comprehending adult problems. Hence, they have extensively covered this topic in the specialized literature since the first study on this subject was published in 1964 by Martin and Lois Hoffman.

1. The authoritarian parenting style, also known as "traumatic educational style," is an extremely severe, rigid, and restrictive style of parenting, which involves the use of physical punishment. It is characterized by a high degree of control, often coupled with a low level of emotional availability on the part of the parents.

2. The permissive parenting style is characterized by a high degree of emotional availability and a low degree of control on the part of the parents.

3. The non-involved parenting style is also called "disengaged" (Maccoby, 1992): when the child is left to chance, without the parent taking too much interest in his needs. (Muntean, 2009, pg. 424-425);

4. The overprotective parental style is characterized by a much too high degree of emotional availability, which will generate exaggerated control (coming not from the need for control, but from the parent's worries and fears).

5. The democratic parenting style is characterized by balance: emotional availability and control are in harmony.

These parenting styles are rarely "pure", sometimes there can be characteristics of at least two styles, depending on the interaction between the parents' personality, the couple's relationship, the type of attachment and the child's temperament.

It's interesting to note that the family style, as described by T. Mircea, is influenced by various factors such as biological, economic, and spiritual

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<sup>2</sup> Apud C. Perjan, *The influence of parenting styles on the development of the emotional sphere at preschool age*. In: Modern trends in practical psychology, National scientific-practical conference with international participation, December 8, 2017. Chisinau: S. n., (Tipogr. UPS Ion Creangă), 2018, p. 27-32.

<sup>3</sup> D. Baumrind, *The influence of parenting style on adolescent competence and substance abuse*. In: *Journal of Early Adolescence*, No. 11(1), 1991, p. 56-94;

Larisa Cuznetov, *Family counseling and education. Introduction to Complex Ontological Family Counseling*. Chisinau, Publisher Primex-Com, 2015.

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motivations. Additionally, the author proposes a classification based on personality traits and how they manifest in the family. It is important to consider the impact of both parental and family styles on the development and well-being of children. Parents and families should strive to create a supportive and nurturing environment that fosters positive relationships and promotes healthy development in children. Professional counseling and education can also play an important role in helping families overcome challenges and improve their functioning.<sup>4</sup>

Thus, the following family styles are identified:

1. Extraverted family style: family members are open, communicative, confident, jovial; life is shared, most of the time (excursions, vacations, visits, etc.) in which all family members are engaged;

2. The introverted family style: family members are isolated, they refuse relationships with others, friendships - in general, almost any external relationship represents for them an intrusion into the privacy of the family;

3. Asthenic family style: lack of vital force, lack of cohesion; there is a lack of will and mutual support, and common projects are also missing;

4. Explosive family style: a permanent tense state with impulsive-aggressive potential;

5. Suspicious family style: the existence of great cohesion problems within the family, which are masked by an exaggeration of concern for a potential danger from outside; keeping a distance from others, any attempt to approach being viewed with suspicion, as an attempt to interfere in family affairs, with the intention of doing harm;

6. Insecure family style: family members have pronounced anxious tendencies, the tendency to isolate and avoid contact with other families or social groups, considered dangerous; overprotective tendencies from the desire to protect children from any situations or persons considered a priori as dangerous;

7. Anancaste family style: a rigidity of relationships within the family, formalism, obsession with rules and order at any cost; ritualistic behaviors, detachment and interpersonal and affective distancing;

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<sup>4</sup> L. Orîndaş, *Parental education in the context of promoting the school-family partnership. Methodological guide*. Chişinău, Institute of Educational Sciences (PrintCaro Typography), 2018, 136 p.

8. Paranoid family style: based on rigidity and permanent suspicion; the world in general is considered to bear the blame for all problems, shortcomings and failures; the others are viewed with exaggerated suspicion, generalized mistrust and all their actions are interpreted as malicious; the existence of tense situations with neighbors, which can even degenerate into enmity;

9. Histrionic or hyperexpressive family style: characterized by spectacular, outward-oriented behaviors; the social exposure is permanent, with the manifest desire to be noticed, to be in the center of attention, regardless of the means (either through extravagance or arousing sympathy); decisions are made exclusively "in the eyes of the world"; it may seem like the "model family"; in relations with others, but everything at the theatrical, surface level.<sup>5</sup>

There are several reasons why family-parenting style is important. Firstly, it is closely related to the development of a child's brain, as by the age of 3, approximately 80% of brain development has already occurred. Additionally, around this age, the child's brain is twice as active as an adult's, making it crucial to have a favorable emotional-affective climate in the family to optimize the acquisition of knowledge and skills.

To help parents understand this truth, continuous education is necessary. This has led to the development of a new field of study called the Pedagogy of Ethics, which aims to go beyond theory and become a practical application. This legitimization has given cognitive validity to Ethics Pedagogy and justifies its pre-theoretical, post-theoretical, and practical value.<sup>6</sup>

The foundation of ethical pedagogy is built on education and is the main tool used in the field.

To ensure the success of ethical pedagogy, it is essential to take a surprising set of actions that focus on the formation of ethical pedagogical intelligence (IPE) through a Transcendental Methodology. Ethical pedagogical intelligence presupposes the capacity of the pedagogue to discern and choose between different alternatives, to separate what is valuable from what is worthless, and to choose what is necessary for carrying out a didactic activity from what is irrelevant for this activity. The

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<sup>5</sup> Ibidem

<sup>6</sup> A. Paniş, *Pedagogy of ethics: a reconstruction in the institution of education*: (Monograph). Chisinau, Institute of Education Sciences, (Print-Caro Typeface), 2020, 260 p.

product of pedagogical ethical intelligence is mental self-governance, which helps ensure that the thoughts and actions of the teaching staff are coherent and appropriate to the ethical needs of education.<sup>7</sup>

It seems that the concept of ethical pedagogical intelligence is not yet widely recognized in the field of pedagogy, and there may be some misunderstandings surrounding it. This may be due to a lack of training programs that focus on the development of ethics in education.

The basis of ethical pedagogical intelligence is J. Guilford's Model of intelligence, which includes *three components*: operations, contents, and products. The operations are primary intellectual processes, the contents of information are of various kinds, and the products are the results of information processing.<sup>8</sup>

Intelligence can be defined as the power to learn and understand, as well as the ability to know and adapt behavior based on surrounding circumstances. Ultimately, intelligence is the ability for a person to create themselves.<sup>9</sup>

*The Parenting Styles Questionnaire (CSP)*<sup>10</sup> is a useful tool for identifying the dominant parenting style in a family. The questionnaire is based on the behavior adopted by parents and identifies five dominant parenting styles: authoritarian, perfectionist, democratic, permissive, and uninvolved. This tool was distributed to 17 employees of an organization who have children in order to identify their educational style in the family. The results of this questionnaire can provide valuable information for pedagogues and educators in understanding the parenting style of their students' families (authoritarian, perfectionist, democratic, permissive, uninvolved, and thus, adjust their teaching methods to better meet the needs of their students. The pedagogue-ethicist can also assume the role of trainer of parents in applied ethics at the family level, providing guidance on how to adopt a more ethical parenting style.

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<sup>7</sup> Ibidem

<sup>8</sup> C. Perjan, *The influence of parenting styles on the development of the emotional sphere at preschool age*. In: Modern trends in practical psychology, National scientific- practical conference with international participation, December 8, 2017. Chisinau: S. n., (Tipogr. UPS Ion Creangă), 2018, p. 27-32.

<sup>9</sup> Ibidem

<sup>10</sup> A. Bolboceanu, A. Cucer, Em. Furdui, M. Batog, *The role of parents and teachers in children lifelong learning, Theoretical-methodological guide*. Chisinau, IȘE, 2019, 226 p.

It's interesting to see how the study aims to explore the correlation between parenting styles and ethical pedagogical intelligence. By using the Parenting Styles Questionnaire and the Educational aspects in the family versus the ethical pedagogical intelligence questionnaire, the researchers can gather data on the dominant parenting style of the participants and their level of development in terms of ethical pedagogical intelligence.

This research approach is important as it provides insights into how parents can leverage their parenting style to improve the quality of education and moral development in their children. By identifying the strengths and weaknesses of different parenting styles, parents can better understand how to support their children's learning and growth. Additionally, by developing their ethical pedagogical intelligence, parents can become more effective in their role as educators and positive role models for their children.

**A.** In the context of the first instrument, *the Parenting Styles Questionnaire (CSP)*,<sup>11</sup> the following data were obtained:

- Age and parenting style: Perfectionist and authoritarian styles were found to be predominant among parents aged 20-35. For parents aged 36-50, the democratic and perfectionist styles were more prevalent.
- Gender and parenting style: The questionnaires were mostly completed by women, as the focus was on female employees of the company.
- Education and parenting style: Among those with professional education, 70% reported using the authoritarian style, 20% used the democratic style, and 10% used the perfectionist style. Among those with higher education, 80% reported using the democratic style, 10% used the authoritarian style, and 10% used the perfectionist style.

From these results, we can conclude that younger parents tend to use a perfectionist and authoritarian style more frequently in their children's education. Additionally, parents with professional backgrounds are more likely to use the authoritarian style. As parents get older, the democratic style becomes more prevalent. Finally, people with higher education are more likely to use the democratic style.

**B.** *The questionnaire "Educational aspects in the family versus ethical pedagogical intelligence"* includes 8 multiple-choice questions to

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<sup>11</sup> Ibidem

which the parents responded by circling one option for each question. Based on their responses, we obtained the following data:

For **the first question** "*Are your children satisfied with the education you provide?*", we found that the parents are:

- a. absolutely satisfied - 97%
- b. relatively satisfied - 1%
- c. I don't know - 2%

Therefore, for the first question, we found that the vast majority of surveyed parents are confident in the education method they apply.

The **second item**, "*What does a good parent mean to your child?*," highlights the following responses from the interviewed parents:

- a. to take care of him and keep him healthy - 30%
- b. to give him a good education - 27%
- c. to understand and support him - 32%
- d. to guide him in life - 8%
- e. to provide him with adequate material well-being - 3%

Thus, it was found that parents (89%) primarily emphasize giving the child understanding and support, taking care of him to be healthy and giving him a good education.

In **the third item** "*How much time do you spend daily with your child/children?*", I noticed the following data:

- a. I am with the children all the time - 21%
- b. between 1-8 hours - 31%
- c. between 9-15 hours - 14%
- d. more than 15 hours - 5%
- e. I don't have time to give them the necessary time - 29%

Based on these results, it was found that a good part of parents (60%) do not really schedule time to be with their children.

For **the fourth item** "*To what extent does the way of being of teaching staff influence your family education style?*", we obtained the data:

- a. to a great extent - 77%
- b. small measure - 18%
- c. default - 4%
- d. I haven't thought yet - 1%

Therefore, it was observed that the majority of parents (77%) are aware of the impact of the way of being of teaching staff on the educational style in the family.

In **the fifth item** "*Which method proposed by the teaching staff do you use more often in your child's education, so that he understands from the first word?*", we identified the following:

- a. discussion on various topics - 10%
- b. banning the computer and other desires - 9%
- c. the friendship relationship between parent and child - 31%
- d. mutual respect - 27%
- e. own positive example - 13%
- f. explanation, negotiation, examples from life - 10%

Thus, the study found that parents take into account all methodological suggestions from teaching staff regarding their child's education. They put more emphasis on the friendship between parent and child (31%) and mutual respect (27%), and less on discussion of various topics (10%) and explanations, negotiations, and examples from life (10%). This indicates that parents may need additional training in the context of moral education and communication.

For **the sixth item**, "*What is the reason for which you scolded your child the last time?*", the following answers emerged:

- a. lied - 12%
- b. doesn't listen to the teacher - 11%
- c. does not tidy up - 17%
- d. do not study - 38%
- e. answered me brutally - 22%

Therefore, it was observed that a good part of parents (60%) are outraged that children are not responsible for learning and that they respond brutally, and less (11%) care that they do not listen to teachers.

In **the seventh item** "*Do you think that the ethical behavior of the teacher gives your child enough education?*", the following data were identified:

- a. yes - 39%
- b. no - 41%
- c. I don't know - 20%

Therefore, unexpected results were attested by the answers of no from 41% of the parents.

For **the eighth item** "*Which values taken from teachers do you pay more attention to in your children's education?*", we obtained the following answers:

- a. moral-ethical (goodness, fairness, responsibility, politeness, etc.) - 81%
- b. aesthetics (beauty, creativity, etc.) - 14%

- c. economic (money management etc.) - 1%
- d. civic (patriotism, etc.) - 3%
- e. others - 1%

The results were as expected; parents are more influenced (81%) by the moral-ethical values taken from teachers in the education of their children.

Synthesizing the results of the questionnaires, we find that the research objectives have been achieved.

We observed a connection between the emotional and psychological state of parents, especially those who are employees and have a high degree of stress in family education. We examined the educational styles used in these families, how it depends on the parents' culture, their training on ethical-pedagogical intelligence, and how it influences the educational style they apply in the family. The study showed visible cohesion between the family and teachers. The law of concord states that the outer world of relationships reflects the inner world of thought and true personality.

**In conclusion**, we can say that what children are and become is very much a reflection of what adults are as a person. However, theoretical-methodological analysis of the cohesion between ethical pedagogical intelligence and educational styles in the family is indispensable.

While most parents tend to criticize and blame their children when they do something they don't like, higher-minded parents see themselves as the primary cause of their children's behavior. In the first years of life, children have almost entirely reactive behavior, and their behavior, good or bad, is largely a reaction to how they are treated by their parents and those around them.

Almost all the problems children have are caused by the perception that they are not fully loved and accepted by one or both parents.

Children always look up to their parents as role models, and being a good role model can be more influential than almost anything else you can do for them.

The most important role as a parent is to raise children with a lot of self-respect and self-confidence.

If children are treated with kindness, patience, love, respect, and approval, they will become fully functioning human beings who fulfill their potential.

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# ALPHABETAZION OR LITERACY. DEVELOPING STUDENT'S NARRATIVE IDENTITY

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***Abstract:** Contemporary society imposes, through new educational trends, a possible replacement of the term alphabetization with that of literacy. To develop literacy skills, it is necessary to understand the conceptual implications. Being in a semantic nothingness, the Romanian language and literature teacher must guide the digitally native student to discover his narrative identity. Self-construction, autobiographical narrative, and memory are three defining elements in the development of narrative identity. Therefore, scholar reading is an important activity in which every student is involved, both with the elements of general culture and with the influences of the social environment. In a society in the midst of digitalization, reading courses must not be built following the classical teaching process, but also by integrating new concepts such as transmedia storytelling. The development of literacy skills in accordance with the principles of digital literacy is mandatory for the digital-native generation.*

***Keywords:** literacy, identity narratives, alphabetization, reading, education.*

At first glance, literacy seems an easy term to understand if we limit ourselves to the meaning of literacy, but it is a constantly evolving concept, interpreted and defined in many ways. In academic research, theories of literacy have evolved from those centered on the individual to complex ones aimed at wider social settings. In parallel with the academic interest in this area and in the international political community, the change of paradigm is felt: from the simple conception of literacy as a process of acquiring elementary cognitive skills, to the use of these skills in ways that contribute to socio-economic development, and then, even to the development of the capacity for social consciousness and critical reflection, as the basis of personal and social change<sup>1</sup>. From a European perspective, literacy is one of the crucial life skills that help citizens develop their capacities for reflection and expression, critical thinking and empathy. Literacy, respectively alphabetization, is considered a new

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<sup>1</sup> Monica Onojescu, Alina Pamfil, *Literacy. Conceptual framework and didactic solutions*, Cluj-Napoca, House of Science Books, 2012, p. 23.

fundamental right of the European citizen, representing the basis of the eight key competences: communication in native language, communication in foreign languages, competences in mathematics, science and technology, competences in the use of new information and communication technologies, the competence to learning to learn, interpersonal and civic competences, initiative and entrepreneurship, cultural awareness and expression.<sup>2</sup> Literacy skills refer to five important aspects that the individual must be aware of when approaching a text, as follows: the ability to read the text, the ability to understand the information in that text, the ability to be metacognitive, the ability to formulate a point of view and express a point of view<sup>3</sup>. So, *literacy* is a cross-cutting term, with experts in the field identifying thirteen types: digital, recreational, disciplinary, civic, multicultural, informational, functional, early, critical, family, etc..<sup>4</sup> But, in the context of the digitalization of the educational system, the focus is on the trans- and intradisciplinarity of the concept of literacy, discussing multidimensional literacy and multiliteracies, because "the term multidimensional literacy or composite literacy tries to define literacy as something beyond basic reading and writing skills and to warn that these two skills are the foundation for the rest of the types of literacy".<sup>5</sup>

In order not to fall into the trap of the concept's plurisemanticism, it is necessary to assimilate and put into practice the concept of literacy, in order to build a foundation on which the skills embedded in literacy will be developed. Literacy is a process of training people to acquire the ability (ability) to write and read. The state of alphabetization (as a result), through writing and reading, helps transmit messages across space and time. According to the explanatory dictionary of the Romanian language, the word *alphabetization* is defined as: the action of alphabetizing; training the illiterate; combating illiteracy, and the verb "to literate": to teach an illiterate to write and read.<sup>6</sup> The process of alphabetization is developed in

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<sup>2</sup> The eight key-competences are defined in *European Reference Framework of key-competences for Lifelong-learning*.

<sup>3</sup> *Literacy at a glance*, Journal of the Romanian Literacy Association, Nr. 1, Anul I, 2015, p. 1.

<sup>4</sup> Lynch Matthew, „What are the 13 types of literacy?“, *theadvocate*, <https://www.theadvocate.org/what-are-the-13-types-of-literacy/>.

<sup>5</sup> *The occupational profile of the family literacy facilitator*, The Library of Kranj City, septembrie 2017, p. 5.

<sup>6</sup> <https://dexonline.ro/definitie/alfabetizare>

relation to the stages of intellectual development reached by the individual. Therefore, Jean Piaget identified four stages of cognitive development, considering that all children go through the same sequence of stages on their way to maturity: the sensory-motor stage - 0-2 years (the child develops its sensory capabilities and motor coordination), the preoperative stage - 2-7 years (language acquisition takes place), stage of concrete operations - 7-11 years (intellectual structures are able to operate almost the same as adult's, but are conditioned by concrete material), stage of formal operations - 11- maturity ( a child's thinking is similar to an adult's). At the opposite of Piaget's theory is the theorist Howard Gardner, according to which the intellect is not formed exclusively on the basis of interaction with the environment, but intelligence has several components and is of several kinds, he considers that learning "how to read" and " to write" using a system of symbols represents one of the most important aspects in a child's development and a mission of modern education. Just like Piaget, Gardner divides symbolization competence into four levels: the stage of simple understanding - 0-2 years (the child has the ability to understand the meaning of words and recognize an object described in the real world, associates the word with the object it refers to) , the stage of basic skills - 2-5 years (the child develops sentences, tells stories), the stage of higher-order skills - early and middle school age (the development of skills from the previous stage is continued by socializing them in certain cultural areas) and the stage of competence in the use of symbols - adolescence-adulthood (individuals have at least the potential to create original symbolic products).<sup>7</sup>

Placing ourselves in a semiotic conflict between *literacy* and *alphabetization*, the problem occurs of how the school succeeds in developing the student's narrative identity during reading hours within the discipline of Romanian language and literature. Paul Ricoeur's elaboration of the notion of narrative identity has two phases. In a first phase, in *Temps et récit*, the French philosopher sees narrative identity - both individual and collective - as "a structure of experience that can integrate the two classes of narratives", i.e. historical and fictional narrative, a locus to become a bridge over the "chiasm between history and fiction".<sup>8</sup> Starting from the difference that exists between the terms

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<sup>7</sup> Simona Elena Bernat, *Effective learning technique*, Cluj-Napoca, Cluj University Press, 2003, p. 91- 98.

<sup>8</sup> Paul Ricoeur, *Soi- même comme un autre*, Editions Du Seuil, Paris, 1996, p. 138.

that refer to the first person, I and self (je/soi), Ricoeur observes, in the preface to *Soi-même comme un autre*, that I designates a punctual, ahistorical identity, an instance that does not subject to conditions of permanence or change over time. Itself is instead the pronoun that designates reflexivity, the return to oneself. The dialectic of idem and ipse as well as the theory of narrative identity is based on this difference.

In a second phase, in *Soi-même comme un autre*, Ricoeur considers that narrative identity intervenes in the constitution of personal identity, to which it gives a temporal dimension, at the same time functioning as a "specific mediator between the pole of the person's character (in which *ipse* and *idem* tend to coincide) and the pole of self-maintenance, in which ipseity is freed from *mêmété*".<sup>9</sup> Starting from the notion of function developed by Vladimir Propp and from that of role by Claude Bremond, Ricoeur suggests that plotting ("la mise en intrigue") generates not only narrative action, but also character development. In other words, the character's identity cannot be detached from his experiences. On the contrary, says Ricoeur, "it shares the regime of dynamic identity proper to narrated history." More precisely, it is the account that - even while constituting a narrative - "constructs the character's identity, which can be called his narrative identity."<sup>10</sup>

In the view of Charles Taylor (*Les Sources du moi*), the self reveals itself through "the history of my progress and regression, of my successes and failures"<sup>11</sup>, in a word through the story of the life events that formed it. All these are indications of a "temporal depth" of the story. Self-consciousness is also the consciousness of our past and future becoming, which takes the form of a story. The life story orients us and differentiates us from others. The purpose of our life is for Taylor a moral one, namely the search for meaning - conditioned by positioning in a certain frame of reference. This meaning is found through its explicit formulation, which depends on our capacity for expression.

Self-construal, narrative autobiographical and memory form a continuous loop in which the three elements constantly influence each other. Therefore, memory feeds the autobiographical narrative, and it defines the self. The resulting self-image influences what we retain in

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<sup>9</sup> *Ibid.*, p. 143.

<sup>10</sup> *Ibid.*, p. 175.

<sup>11</sup> Marcela-Cristina Oțoiu, *Identity Narratives*, Scientific Journal, Philology Fascicle, Seria A, Vol. XXVII, 2018.

memory, and that selection alters the autobiographical narrative. The new self-story also changes the way we define ourselves. The loop continues, and changing any point produces changes in the other two. This is the image of the interactions between the three factors proposed by William Hirst<sup>12</sup>, an image of a continuous reconstruction of the self.

In the school environment, reading is an important activity, in which the reading student is involved, with his entire culture, with the social environment in which he lives. It is the connection between the reader and the author of the text, with the aim of motivating the reader<sup>13</sup>. The teacher must have the specific skills to go through certain didactic steps to provide the student with strategies for deciphering the read text. Alina Pamfil talks about sketching a course of the act of reading and interpretation consisting of four types of relationships between the reader and the text: entering the world of the text, stepping from the outside to the inside; to explore the world of the text from within; to step back and rethink the data; to step out of the world of the text and objectify the experience. Complementarily, Marilena Pavelescu develops the concept of *innocent reading*. It is the moment of the first contact with the text, either through mental reading or by listening to an expressive reading done by someone else, the teacher, in which the emotional reaction to the text is valued. In the books read, the middle school student looks for mystery and appealing characters with whom he can identify. The pleasure of the game is preserved in the pleasure produced by the stories, in the enjoyment of role-playing games. The literary work is a projection of the real world, of the set of values and norms of its own readers and stimulates the identification of young people in search of identity. The teacher can complete this stage by asking questions like "What did you like/dislike?"; "Why?"; "What surprised you the most?"; "Do you feel that you have entered the world of the text?". Reading appears as a basic intellectual activity of the student, carried out in all school subjects, but the formation of reading competence becomes a priority in the subjects included in the curricular area Romanian language and literature, foreign languages, modern languages, universal literature, joining a flexible and dynamic educational process, involving activities of understanding and reception, decoding and interpretation, transformation

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<sup>12</sup> William Hirst, "The Remembered Self in Amnesics," in Neisser & Fivush (eds.) *The Remembering Self*, p. 253.

<sup>13</sup> Grațiana-Maria Marina, *Reading as a specific method of the discipline and as a literary-cultural activity*, [www.edict.ro](http://www.edict.ro).

and production of new meanings and values. The basic purposes of this reading process are formed both by the specific skills provided by all school programs from the 1st to the 12th grade (comprehension and reception, decoding and interpretation, oral and written communication, etc.), as well as a set of values and attitudes obtained exclusively through literary-artistic education, claims Vl. Pâslaru. The existing theoretical concepts in the school programs, especially in those for the high school cycle, require the formation of an expert reader who is able to produce, orally or in writing, text about the text, but also text against the text, thus achieving analytical capabilities, interpretation, argumentation, critical thinking. Theoretically, the profile of the ideal reader is built, the one who will be able to use all this in everyday life, in any communication situation. It is that reader/speaker with articulate, coherent, nuanced and expressive language. He is the ideal reader/speaker, but in today's society we are witnessing a reading crisis, which worries teachers and parents, up to book producers, be they authors, publishers. The motivation of lack of free time is outdated because there is always free time for the computer<sup>14</sup>. Compared to other generations, *Gen Z* doesn't sit and listen, they want/try to see; the teacher is not a *magister dixit*, but must be a facilitator in the teaching process, she is not so much interested in the content of learning as in the "how?" process; the curriculum must be learner-centered, not teacher-centered; it is open to the world, to change<sup>15</sup>. Starting from this premise and leaving behind, for the moment, the statistics related to national and international assessments, we consider the fact that students read. They do not approach reading in the traditional way, they do not always look for the course of the story, the original and the adventure, but they are concerned with the processes of consciousness of the characters, with the analysis of behaviors and relating to the text through the lens of a different set of principles. In trying to form the narrative identity of students, teachers face a generation dubbed *generation C: connecting, collaborating, creating*. They are anchored in the present, a little resistant to hardship, avoid confrontation, and nothing seems impossible to them. Born in the era of the active web, these young people have a multitasking approach: they solve homework, listen to music, watch a movie at the

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<sup>14</sup> Smaranda Graur, "The importance of reading in developing communication skills", in *Pleasure reading from theory to examples of good practice*, Nr. 1/ 2018, Cluj-Napoca, 2018, p. 6.

<sup>15</sup> Elena Bonchiș, *Generation Z: A psychological and educational perspective*, Iași, Polirom, 2021, p. 77.

same time, write a message on the phone or computer, being completely uninhibited. Their lives merge with digital life.<sup>16</sup>

The student's narrative identity results from the organization of experience, from the reevaluation and assembly of childhood identifications and is a stable, consistent value core of the self, providing coherence between the way the person views himself and his relations with the outside world. The resulting self-image influences what is retained in memory, and that selection alters the autobiographical narrative. The concept must be related to the current trends in the development of literacy competence and the educational profile of the digital native student. The Romanian educational system is faced with the problem of developing narrative identity and literacy skills in a society undergoing digitization in which the acquisition of digital literacy skills is also necessary, because a digital native must also be a literate person from this point of view to critically evaluate information and use technology in personal and professional development. For these reasons, we can discuss the formation of a narrative-digital identity, because school literature has gone beyond the classic framework of the printed book through the school approach to transmedia narratives.

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[www.dexoline.ro](http://www.dexoline.ro)

# DEVELOPMENT TRENDS OF THE ENGLISH CLINICAL VETERINARY TERMINOLOGY SYSTEM

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***Abstract:** The article presents the main characteristics of the English clinical terminology system of veterinary medicine such as scientific base, systematization, accuracy and unification, variability, comprehensibility, standardization, development and adaptation, technological integration. The peculiarities of the formation of English clinical veterinary terms are characterized. The research trends and lexical peculiarities of the terms of the clinical veterinary field are highlighted. Factors contributing to its development and the increase of the terminological array are considered.*

***Keywords:** development trends, veterinary clinical terminology system, extralinguistic factors, updated terms.*

## Introduction

Today, veterinary medical science is one of the most progressive in the world. For specialists in various fields of knowledge, the veterinary field is the basis for new research, in particular for linguists.

The terminology of veterinary medicine is a set of names denoting the concept of veterinary medicine as a science, and special nomenclature names of veterinary medicine as a field of professional activity. The modern terminology of veterinary medicine is one of the broadest and the most complex in conceptual and substantive term.

The terminology of veterinary medicine consists of three main terminological groups: anatomical, clinical and pharmaceutical, each of which defines its own range of concepts. Anatomical terminology names the animal organs and their functions, clinical – indicates the names of diseases, their symptoms, painful conditions, and pharmaceutical – gives the names of medicinal products.

Clinical veterinary terminology is one of the most complex subsystems of veterinary terminology, which includes lexemes of morphological formations and processes that are characteristic of the

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animal organism in a normal or pathological state, names of pathogens, symptoms of diseases and pathological states of the animal organism, names of the disease course forms, diagnostic and operational procedures, tools, diagnostic and laboratory equipment, etc. One of the main trends in modern clinical veterinary medicine is the extraordinary diversification of vocabulary in general and terminology in particular.

An important extralinguistic factor in the development of veterinary medicine, and with it the formation of the term system of clinical veterinary terminology, is the development of branch science, scientific and technical progress in general, which, along with other extralinguistic reasons for the development of the term system, stimulate the emergence of new concepts and their names. The topic relevance is related to the determination of trends in the process of creating units of terminological vocabulary and the influence on them of extralinguistic factors of terminological nomination, which are in close correlation with the specifics of scientific knowledge in the veterinary field.

**The purpose of the study** is to determine the trends in the formation of the English clinical terminology system of veterinary medicine, the conditions of its and development, and extralinguistic factors, stimulating the emergence of new concepts and their names.

### Literature Review

Linguists have carried out a number of studies of veterinary terminology, which determine its main characteristics. Trends of formation of clinical veterinary terminology was studied by M. Lychuk<sup>1</sup>. The study of O. Syrotina, Yu. Rozhkov was devoted to genesis of veterinary medicine terminology<sup>2</sup>. In the scientific studies of T. Nemova and M. Lychuk the peculiarities of the formation of clinical veterinary terminology, the structural organization of its terms were considered<sup>3,4</sup>.

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<sup>1</sup> M.I. Lychuk, *Trends of formation of clinical veterinary terminology. Linguistic ecology: the language of medicine*. Materials of the All-Ukrainian scientific-practical conference with international participation. February 22 - 23, 2023, Ukraine, Lviv, 2023, p. 103-108.

<sup>2</sup> O., Syrotina, Yu., Rozhkov, *Genesis of veterinary medicine terminology (based on English and Ukrainian languages)*. Materials of the All-Ukrainian scientific-practical conference with international participation. February 22 - 23, 2023, Ukraine, Lviv. P.119-126.

<sup>3</sup> T.V., Nemova, M.I., Lychuk, *Clinical veterinary terminology*. International Philological Journal. Vol. 11, No. 1, 2022. p. 73-81.

<sup>4</sup> T.V., Nemova, M.I. Lychuk, *Features of the formation and translation of the terminology of clinical veterinary hematology*. International Philological Journal Vol. 11. No. 3. 2020, p. 73-81.

Origin sources of the English veterinary terminology were the subject of scientific research by O. Syrotina<sup>5</sup>.

However, research by linguists devoted to certain aspects of veterinary terminology in the English language, do not provide an opportunity to make a complete picture of how veterinary terms are formed with the development of veterinary science.

The study of the general trends in the development of the English clinical veterinary terminology and the peculiarities of its formation is important from both a theoretical and a practical point of view.

The study of the corpus of language material of the clinical veterinary terminology is conditioned, first of all, by the interest of modern linguistics in the study of separate thematic clusters, in special lexical units that reflect the result of the specialist's activity. In this regard, it becomes important to study the term system as a universal means of obtaining, storing and representing any knowledge, including veterinary medicine. Thus, V. Tatarinov notes the fact that over time the term system is used as: 1) a classification structure; 2) method of collection, systematization and unification of material; 3) the linguistic space of the terms; 4) an effective means of professional activity<sup>6</sup>.

Summarizing the ideas that have developed in the literature about the concept of "terminology" and the principles of its organization, the terminological system of clinical veterinary medicine can be defined as a structured set of terms that provide the nomination of the basic concepts of veterinary medicine, interconnected by logical, semantic and other relationships. Ultimately, this is a set of terms organized in a certain way, in the formation of which a combination of objective and subjective factors played a leading role.

It can be considered established that two groups of factors play an important role in the formation of terminological systems: 1) extralinguistic factors, which determine the need to nominate the concepts of a branch of knowledge and areas of activity, as well as the need to detail the concepts of fundamental areas of science transferred to an applied terminological system; 2) associated with the variety of conceptual relations conveyed by terms, as well as with the possibility of combining

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<sup>5</sup> O., Syrotina, *Origin sources of English veterinary terminology*. Euromentor. Vol. 14. Issue 1. 2023, p. 117-135.

<sup>6</sup> V.A. Tatarinov, *Terminological vocabulary of the Russian language: Evolution of problems and aspects of study*. Russian language in modern society: Functional and status characteristics. Series "Theory and History of Linguistics". Moscow, 2005, p. 136-138.

conceptually different components in such verbose terms. At the same time, some researchers even argue that in English the replenishment of terminological systems is more dependent on extralinguistic factors. Any term system inevitably goes through certain stages associated with the development of the relevant field of knowledge.

Consider the characteristic features of the studied terminological system.

1. Scientific base. The English clinical veterinary terminology system is based on scientific principles and uses terms that are consistent with current medical research, practice and standards.

2. Systematization. The terminology system of the English clinical veterinary medicine contains a systematized set of terms used to describe various aspects of animal health, disease, and treatment.

3. Accuracy and unification. The English clinical terminology system of veterinary medicine sets itself the task of ensuring an accurate and unified perception of medical information. She uses clear and unambiguous terms that avoid misunderstandings and errors in communication.

4. Variability. Given the wide range of animal species, the English clinical veterinary terminology includes terms relating to different animal species, their characteristics, physiology and diseases.

5. Comprehensibility is an important aspect of veterinary medicine. Veterinarians strive to effectively communicate with pet owners, many of whom may not have a medical background or training. The ability to convey complex medical information in a clear and understandable manner is crucial for ensuring that pet owners can make informed decisions about their pets' healthcare.

6. Standardization. The English clinical terminology system of veterinary medicine is subject to standardization, which allows to ensure the unity of terminology in different areas of veterinary medicine. This promotes understanding, information sharing and collaboration between veterinary medicine professionals.

7. Technological integration. Modern English veterinary clinical terminology also takes into account technological changes and integrates with digital resources. This includes the use of electronic medical records, web portals, mobile applications and other tools that facilitate information sharing and collaboration between veterinary professionals.

The English clinical terminology system of veterinary medicine is constantly evolving, updating and adapting to changes in veterinary

medicine. It takes into account new research, technologies and trends, which allows the use of current terminology. New research studies and findings contribute to the development of new terminologies, as they provide insights into new diseases, treatments, and diagnostic techniques. As scientific knowledge expands, terminology is adjusted to reflect these advancements accurately. Technological advancements also play a significant role in the evolution of veterinary clinical terminology. New diagnostic tools, imaging techniques, laboratory tests, and treatments are continuously being developed and integrated into veterinary practice. As these technologies become more prevalent, the terminology must be updated to describe and categorize them accurately. Moreover, the evolving trends in veterinary medicine, such as the emergence of new specialties or changes in treatment approaches, can influence the development of clinical terminology. These trends may introduce new terms or redefine existing ones to align with the current practices and understanding of veterinary medicine. To ensure the use of current terminology, veterinary professionals, researchers, and organizations involved in the field collaborate to review, update, and standardize veterinary clinical terminology. This process involves establishing guidelines, creating standardized vocabularies, and maintaining databases or resources that reflect the latest advancements. Overall, the constant evolution, updating, and adaptation of the English clinical terminology system in veterinary medicine is crucial for effective communication, accurate documentation, and the provision of high-quality care for animals.

Thus, an important extralinguistic factor in the development of clinical veterinary medicine, and with it the formation of its terminology, is the development of branch science, scientific and technical progress as a whole, which, along with other extralinguistic reasons for the development of the terminology, stimulate the emergence of new concepts and their names.

With the development of new research, technologies, scientific discoveries and approaches to the treatment of animals, the terminological apparatus of clinical veterinary medicine is updated and increasingly replenished.

The following are some examples of such updated terms. "Minimally invasive surgery", this term describes surgical procedures that are performed using miniature instruments and external access, resulting in less trauma to the animal and faster recovery after surgery; "regenerative

medicine" is used to describe new treatments that promote the regeneration of animal tissues and organs. These may include methods that use stem cells, growth factors, or other biological materials to promote tissue healing and repair.

"Zoonotic diseases" are diseases that can be transmitted between animals and humans. Zoonotic diseases include such diseases as brucellosis, rabies, listeriosis and others. Understanding these diseases and their transmission is important for public health. The term "telemedicine" is used to describe the use of communication technologies to provide remote medical consultation and diagnosis in veterinary medicine. This may include the use of video communication, photo or video analysis, audio consultations, and so on. Telemedicine can help reduce distance and facilitate access to medical care for animals in remote areas. The term "one health" refers to the concept that human, animal and environmental health are inextricably linked. The "one health" approach requires collaboration between veterinarians, general practitioners, epidemiologists, ecologists and other specialists to maintain the health of all components of the ecosystem.

The following terms highlight the integration of technology into veterinary medicine and demonstrate how the clinical terminology system has evolved to encompass these advances. "Digital radiography" is the use of digital imaging technology to capture and view X-ray images, allowing for enhanced image quality, storage, and sharing capabilities. "Electronic Health Record" (EHR) is a digital record system that contains a comprehensive collection of a patient's medical information, including medical history, diagnoses, treatments, laboratory results, and other relevant data. "Point-of-Care Testing " (POCT) is the use of portable and rapid diagnostic devices, such as handheld blood analyzers or urine test strips, to obtain immediate test results directly at the patient's location. "Wearable Technology" are devices worn by animals to monitor their health and activity levels continuously. Examples include GPS tracking collars, activity monitors, or biometric sensors that track heart rate and temperature. "Veterinary Information Systems " (VIS) is computerized systems designed to manage and store veterinary medical data, including appointment scheduling, billing, inventory management, and patient records. "Computerized Tomography" (CT) is imaging technique that uses X-rays and computer processing to create detailed cross-sectional images of the body, helping to diagnose and evaluate various conditions. "Magnetic Resonance Imaging" (MRI) is a non-invasive imaging technique

that uses magnetic fields and radio waves to generate detailed images of soft tissues, organs, and structures within the body. "Data analytics " is the use of advanced software and algorithms to analyze large volumes of veterinary medical data, identify patterns, and derive insights to improve diagnoses, treatment plans, and overall patient care.

The use of digital technologies in veterinary medicine illustrate the integration of clinical terminology with digital resources. However, it is worth noting that this field continues to develop, so new terms may appear over time.

The English Clinical Veterinary Terminology System plays an important role in the global cooperation and exchange of information in the field of veterinary medicine. Many studies show that English-language veterinary terminology is dominant in the modern world. As noted by Yu. Rozhkov, approximately 75% of all information on veterinary medicine in the world is published in English<sup>7</sup>.

Since English is the language of communication in many countries of the world, it has become the most common language in scientific publications, conferences and other forums related to veterinary medicine. Standardized terminology helps ensure unambiguous understanding between specialists from different countries. Veterinarians, researchers, and other professionals may use common terms to describe diseases, procedures, drugs, and other aspects of veterinary medicine. This facilitates effective communication, exchange of experience and cooperation between specialists from all over the world.

Being a common language, English also helps in popularizing research and new discoveries. The presence of one language facilitates the faster dissemination of new knowledge and technologies in the field of veterinary medicine, which affects its development and improves the level of treatment of animals around the world.

## **Conclusion**

The main characteristics of the English clinical terminology system of veterinary medicine are presented. They are scientific base, systematization, accuracy and unification, variability, comprehensibility, standardization, development and adaptation, technological integration.

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<sup>7</sup> Yu., G. Rozhkov, *Borrowing processes in the terminology of veterinary medicine*. Scientific notes of the National University "Ostroh Academy". Series: Philological. Issue 60. 2016, p. 228.

Two groups of factors influence the development and formation of the terminology system: 1) extralinguistic factors, which determine the need to nominate the concepts of a branch of knowledge and areas of activity, as well as the need to detail the concepts of fundamental areas of science transferred to an applied terminological system; 2) associated with the variety of conceptual relations conveyed by terms, as well as with the possibility of combining conceptually different components in such verbose terms.

In general, the English clinical terminology system of veterinary medicine is a systematized, scientific and effective terminological system that promotes accurate communication, comprehensibility and effective exchange of information in the field of veterinary medicine. It takes into account the needs of different species of animals and allows veterinary medicine specialists to communicate and cooperate at the international level. In addition, the terminology system is constantly developing and adapting to new scientific discoveries and technological changes, which allows it to remain relevant and be used in modern veterinary practice.

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# THE ROLE OF FISCAL BUDGETARY POLICY IN REDUCING TAX EVASION

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***Abstract:** Countries all over the world suffer from incidents of tax fraud and money laundering. It has been established that tax evasion is one of the worse offenses associated with tax fraud and money laundering. In their bid to curb tax evasion, most countries have introduced laws and legislation that make the practice punitive with the aim of serving as deterrent to others. This approach has however failed to a large extent as the practices continue to be on the rise. This study investigates and advocates for a change in approach that prioritizes prevention over punishment. There may be several modalities to executing the preventive approach to tax evasion. In this study, the use of fiscal budgetary policy that lessens the economic burden of citizens has been recommended. Three main outputs of fiscal budgetary policies have been examined against the levels of tax evasion in South Africa, U.S.A., U.K, China, and Brazil. These are tax burdens, unemployment rate, and inflation rate. Secondary data was collected from the five countries, after which quantitative analysis was performed involving both descriptive and inferential statistics. Results have showed that the preventive approach is also not statistically significant in reducing tax fraud if fiscal budgetary policies target reducing tax burden, unemployment and inflation. Governments aiming to use the preventive approach should therefore research into other economic indicators and policies rather than these three if they want to achieve significant impact.*

***Keywords:** Fiscal budgetary policy, preventive approach, tax evasion, money laundering, tax fraud, tax burdens, unemployment, inflation.*

## Introduction

In the U.S.A. and most other developed economies, tax evasion is measured as tax gap, which is defined by the difference between amount

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of taxes owed and those that are not paid in a timely or voluntary manner.<sup>1</sup> Tax evasion is said to have taken place when an individual or entity fails to pay taxes that are owed. The practice is illegal but continues to take place anyway. Gale and Krupkin quantified the severity of tax evasion levels in the U.S.A. by noting that “one out of every six dollars owned in federal taxes is not paid” (p. 1).<sup>2</sup> This figure translates to three-quarters the size of the annual federal budget deficit. What this means is that should the government have succeeded in collecting all taxes through voluntary payment, and on time, it could have reduced the amount of spending that exceeds revenue by three-quarters. This way, government debt would have gone down, driving economic growth across different sectors.

### Literature Review

Guyton et al. argued that the use of more effective approaches to combating it would see some significant success in the government’s efforts to combating tax evasion.<sup>3</sup> What this implies is that whereas individuals and businesses involved in tax evasion can be criticized as being unpatriotic, government also has a responsibility in ensuring that its efforts at collecting taxes are effective to make it difficult for people to escape payment either deliberately or inadvertently.

Tax evasion is a big problem for several countries around the world, including the U.S.A. Latest figures from the Internal Revenue Service (IRS) show that up to 16 percent of taxes are annually since 2008. This amount averages \$400 billion each year, and is equivalent to 2.8 percent of the annual gross domestic product (GDP).<sup>4</sup> This is how big the problem of tax evasion is, as the amount of unpaid tax due to evasion also equates to 18 percent of annual federal revenues for each year. With this kind of shortage in the annual revenue for each year, government is unable to

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<sup>1</sup> A. Uyar, K. Nimer, C. Kuzey, M. Shahbaz & F. Schneider, *Can e-government initiatives alleviate tax evasion? The moderation effect of ICT*, Technological Forecasting and Social Change, 166, 2021.

<sup>2</sup> W.G. Gale & A. Krupkin, *How big is the problem of tax evasion?* Brookings. <https://www.brookings.edu/blog/up-front/2019/04/09/how-big-is-the-problem-of-tax-evasion/>, 2019.

<sup>3</sup> J. Guyton, P. Langetieg, D. Reck, M. Risch & G. Zucman, *Tax evasion at the top of the income distribution: Theory and evidence*, No. w28542, National Bureau of Economic Research, 2021.

<sup>4</sup> Ibid 2.

meet its revenue targets to accomplish key and important budgetary goals.<sup>5</sup> Alm emphasized the need to address tax evasion, noting that the practice does not only represent individuals and businesses stealing from government, but also represents evaders cheating their neighbors who pay taxes for the development of the country.<sup>6</sup> From the body of literature, there are calls to switch from the use of punitive approach to reducing tax fraud to the use of preventive approach.<sup>7</sup> For example, Islam et al. argued that using fiscal budgetary policies to reduce tax burden by reducing tax rates will limit the tendency of people evading tax because they will not feel the burden that taxes have on their economic wellbeing.<sup>8</sup> Ariyanto et al. also made similar claims for unemployment and inflation, asserting that reducing the rates of these macroeconomic indicators can bolster the motivation of individuals and businesses to pay taxes.<sup>9</sup> Also, to combat tax evasion, it is not enough just to implement blockchain technologies in the public administration. It is recommended to adopting relevant measures, such as international law, that will stop the elements of the shadow economy associated with the adoption of blockchain technology.<sup>10</sup>

## Methodology

### Aim and hypothesis

Based on the background and problem described above, the study was conducted with the aim of investigating the effectiveness of preventive approaches to tax evasion as against punitive approaches. The preventive approach in this context is defined by the use of fiscal budgetary policies that create the right and enabling tax environment

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<sup>5</sup> A. Androniceanu, R. Gherghina & M. Ciobănașu, *The interdependence between fiscal public policies and tax evasion*, *Administratie si Management Public*, 32, 2019, p. 32-41.

<sup>6</sup> J. Alm, *Tax evasion, technology, and inequality*, *Economics of Governance*, 22(4), 2021, p. 321-343.

<sup>7</sup> D.M. Kemme, B. Parikh & T. Steigner, *Tax morale and international tax evasion*, *Journal of World Business*, 55(3), 2020.

<sup>8</sup> A. Islam, M.H.U. Rashid, S.Z. Hossain & R. Hashmi, *Public policies and tax evasion: evidence from SAARC countries*, *Heliyon*, 6(11), 2020.

<sup>9</sup> D. Ariyanto, G.A.P. Weni Andayani & I. G.A.M.A. Dwija Putri, *Influence of justice, culture and love of money towards ethical perception on tax evasion with gender as moderating variable*, *Journal of Money Laundering Control*, 23(1), 2020, p. 245-266.

<sup>10</sup> R.A. Mititelu & B.F. Amzuică, *The implementation of blockchain technologies. The impact on the shadow economy for a sustainable future*, *Technium Social Sciences Journal*, 39(1), 2023, p. 393-410.

through tax cuts, job creation and lowered inflation. It is hypothesized that there is a significant relationship between the impact of fiscal budgetary policy on individuals and businesses, and ability to achieve decreased tax gap levels. A different hypothesis will be tested for three main variables that constitute fiscal budgetary policies, which are tax burden, unemployment and inflation. The position to be investigated in this paper therefore is that as government focuses its fiscal budgetary policies on cutting down taxes, lowering unemployment and reducing inflation, individuals and businesses will be motivated to pay taxes rather than evade same.

In order to test the hypothesis, the researcher used quantitative research method. The quantitative research method involves the use of numeric and statistical indices in the collection and analysis of data.<sup>11</sup> Quantitative research method was found to be ideal for the study given the nature of data the researcher was used, which was numeric in nature. The data were also large, requiring the use of statistical indices that could be employed to generalized the outcome of analysis. The quantitative research method was however carried out through the use of secondary data. This means the researcher did not personally collect first hand data relating to the variables emerging from the study.<sup>12</sup> The use of secondary data was ideal in this situation because the data used are those specifically generated by recognized national institutions rather than through field research. The data used included values and figures for tax evasion rates, tax burden levels, unemployment rate, and inflation rate.

The data used are not those that the researcher can personally generate, thus the need for the secondary data collection method. In order to effectively undertake the secondary data collection procedure, the researcher identified a number of databases where credible and accurate data could be sampled. The databases were the Central Banks of five countries involved in the study. The countries are South Africa, U.S.A., U.K, China, and Brazil. Data was also collected from the World Bank, International Monetary Fund, and Statista, where applicable. Both descriptive and inferential statistics have been used to analyze the data to enable the researcher draw the needed relationship between fiscal

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<sup>11</sup> L.L. Chan, & N. Idris, *Validity and reliability of the instrument using exploratory factor analysis and Cronbach's alpha*, International Journal of Academic Research in Business and Social Sciences, 7(10), 2017, p. 400-410.

<sup>12</sup> J.M. Chevalier & D.J. Buckles, *Participatory action research: Theory and methods for engaged inquiry.*, Routledge, 2019.

budgetary policies and tax evasion. To test the hypothesis, Pearson correlation analysis was utilized. This was done by setting the significance level at  $P \leq 0.05$ . This means if a Pearson coefficient of less than 0.05 was produced, the result will be considered as significant and so the null hypothesis will be rejected.

## Results

This chapter contains the main results sampled from the secondary sources for the study. The results are presented in four main sections to reflect all variables within the research aim, including levels of tax evasion, influence of tax burdens on tax evasion, influence of unemployment on tax evasion, and influence of inflation of tax evasion. Based on the respective results for each of these, the discussion will be drawn to state the position of the hypothesis on whether or not there is significant relationship between fiscal budgetary policy and efforts to reduce the rate of tax evasion.

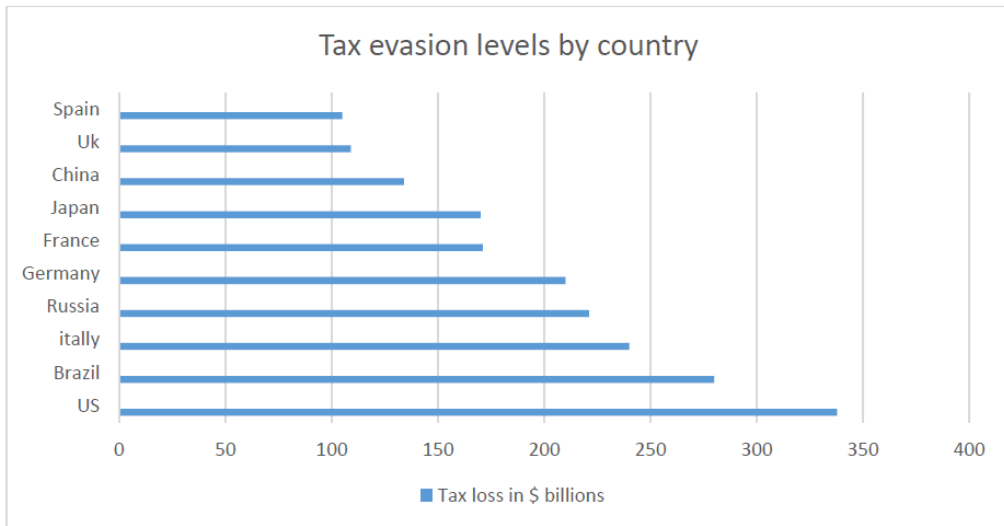
### *Levels of Tax Gap*

Data was collected to determine the extent of tax gap levels across the five major countries used in this case study. The sources of data showed that different countries gave different interpretations to tax gap and tax evasion, where the two terms were used interchangeably in some countries. In other countries such as the UK, tax gap was treated differently from tax evasion, with data on tax evasion presented under the broad topic of tax gap. Under such circumstance, data for tax gap was used instead of tax evasion. Where tax evasion was measured as tax gap, data was used for only tax evasion. The table and figure below show the percentage of taxes unpaid for each of the five countries the latest year of data release.

**Table 1: Percentage of Taxes Unpaid**

Country	Percentage of taxes unpaid	Latest year of data release
UK	6.2%	2022
USA	16%	2022
South Africa	30%	2020
Brazil	18%	2021
China	20%	2022

From table 1, it would be seen that the UK has the lowest percentage of taxes unpaid, with South Africa having the highest. It is important to stress however that in nominal terms, the dollar amounts of taxes unpaid do not follow this order, as countries with bigger economies and larger populations have higher tax expectations, and so their nominal tax evasion amounts will be higher even when the percentage of unpaid taxes is lower. In terms of nominal amounts of tax evasion levels, the figure below shows that the U.S.A. has the highest amount among nine other countries including China, UK, and Brazil, all of who were included in this study.



**Figure 1: Tax evasion levels in dollar terms**

Source: Al Karaawy and Al Baaj (2018)

For quantitative purposes, the researcher used the data for percentages in all subsequent analysis rather than the nominal amounts.

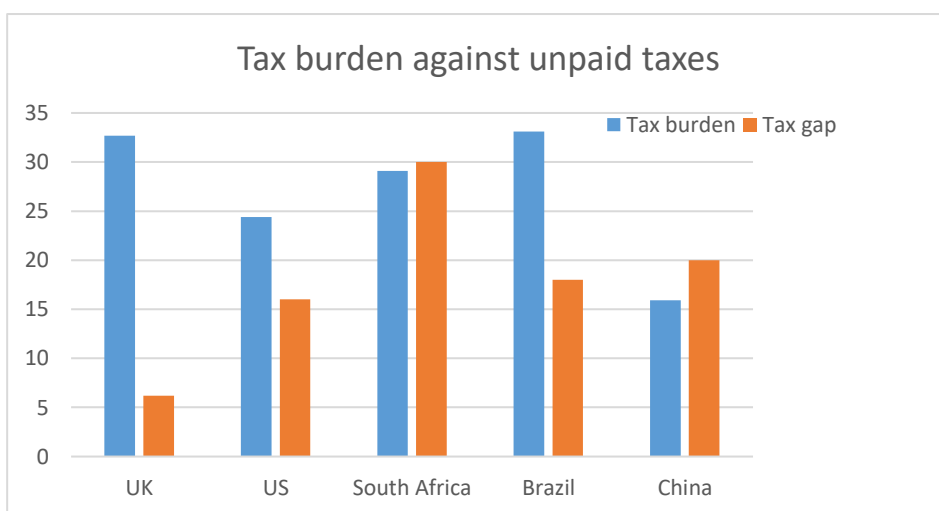
***Influence of Tax Burden on Tax Gap***

The first part of the hypothesis testing was to determine the influence of tax burden on tax evasion. To achieve this, data was collected on the tax burden of each of the five countries as percentage of GDP. Tax burden is defined as the measure of increased tax liability on payers. It is often expressed as the difference in tax that is paid by producers and consumers, and is also expressed as the tax burden ratio (Vaidya, 2020). A correlation analysis was then performed using the tax burden levels and tax evasion rates to establish statistical relationship. The correlation analysis was however preceded by descriptive analysis of the available data.

**Table 2: Tax to GDP ratio for 2021<sup>13</sup>**

Country	Tax burden	Tax gap
UK	32.7%	6.2%
USA	24.4%	16%
South Africa	29.1%	30%
Brazil	33.1%	18%
China	15.19%	20%

From table 2, it would be seen that the levels of tax burden for the five countries vary, ranging from 15.19% in China to 33.1% in Brazil. The figure below compares the tax burden to unpaid taxes in pictorial format.



**Figure 2: Tax burden versus unpaid taxes**

From figure 2, it is seen that countries like UK, US and Brazil have high tax burden but the percentage of unpaid taxes are lower than the tax burden. Kassa attributed such situation to rigorous tax collection system. Conversely, the percentage of unpaid taxes is higher in South Africa and China than the tax burden.<sup>14</sup> There is however no clear indication from the figure as to whether a correlation exists between the tax burden and

<sup>13</sup> Wise Voter, *Highest taxed countries*, 2023 <https://wisevoter.com/country-rankings/highest-taxed-countries/>

<sup>14</sup> E.T. Kassa, *Factors influencing taxpayers to engage in tax evasion: evidence from Woldia City administration micro, small, and large enterprise taxpayers*, *Journal of innovation and entrepreneurship*, 10(1), 2021, p. 1-16.

unpaid taxes. This was why the correlation analysis was necessary. Results of the correlation analysis has been presented below.

### Descriptive Statistics

	Mean	Std. Deviation	N
UnpaidTax	18.0400	8.53276	5
TaxBurden	27.0420	7.13879	5

Results of the descriptive statistics show that the mean unpaid tax rate is 18.04% for the five countries, while the mean tax burden is 27.04%. This means the tax burden is generally higher the unpaid tax levels. Further correlation analysis was performed. The first set of hypotheses are given below:

H<sub>1</sub>: There is a significant relationship between the level of tax burden and level of tax evasion.

H<sub>0</sub>: There is no significant relationship between the level of tax burden and level of tax evasion.

Based on the hypotheses, the independent variable is tax burden while the dependent variable is tax evasion. This means the researcher measured if reducing tax burden as a fiscal budgetary policy has an effect on tax evasion levels.

### Correlations

		Tax Burden	Tax Gap
Tax Burden	Pearson Correlation	1	-.242
	Sig. (2-tailed)		.694
	N	5	5
Tax Gap	Pearson Correlation	-.242	1
	Sig. (2-tailed)	.694	
	N	5	5

From the correlation table, it would be noted that the relationship between tax burden and unpaid taxes is not statistically significant. For this reason, the null hypothesis cannot be rejected, which means There is no significant relationship between the level of tax burden and level of tax evasion. The correlation results also show that the relationship between tax burden and tax gap is negative. The indication here is that contrary to what most analysts have suggested in literature, as the level of tax burden goes up, the tax gap rather goes down. Benkraiem discussed the possible reason for such behavior by stressing that when tax payers have a lot of trust in the government to utilize the taxes paid for developmental agenda, they develop positive towards payment of tax.<sup>15</sup> Under such circumstance, increased tax rates are interpreted as increased levels of expected development, for which reason they gladly pay, thereby reducing the levels of tax gap.

***Influence of Unemployment on Tax Evasion***

For next sub-theme, the researcher analyzed the influence of unemployment on tax evasion. That is, the researcher investigated if high unemployment rate can be a reason for increased tax gaps and tax evasion behavior among citizens. Firstly, descriptive data for the unemployment rate for the five countries was collected and analyzed. The table below presents data for unemployment rate for 2022 as against the tax gap levels for the five countries.

**Table 3: Unemployment rate and tax gap<sup>16</sup>**

Country	Unemployment rate	Tax gap
UK	4.53%	6.2%
USA	3.4%	16%
South Africa	26.9%	30%
Brazil	14.4%	18%
China	4.71%	20%

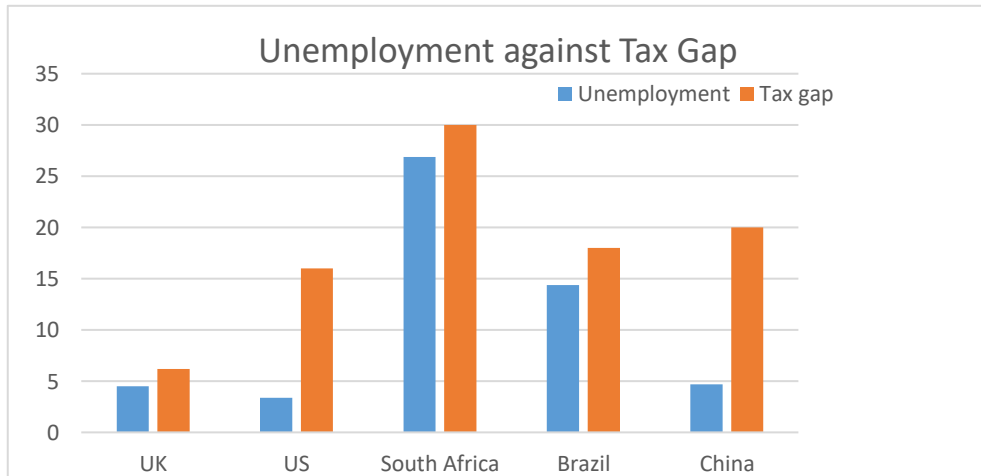
From table 3, it would be noted that there are two broad categories of countries in terms of unemployment. These are those with high

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<sup>15</sup> R. Benkraiem, A. Uyar, M. Kilic & F. Schneider, *Ethical behavior, auditing strength, and tax evasion: A worldwide perspective*, Journal of International Accounting, Auditing and Taxation, Elsevier, vol. 43(C), 2021.

<sup>16</sup> World Population Review, *Unemployment by country 2023*, 2023 <https://worldpopulationreview.com/country-rankings/unemployment-by-country>

unemployment, including South Africa with 26.9% and Brazil with 14.4%, and those with low unemployment rate, including UK with 4.5%, US with 3.4%, and China with 4.7%. The figure below compares the unemployment rate with tax gap.



**Figure 3: Comparison between unemployment rate and tax gap**

A trend that can be found in figure 3 is that all five countries have higher tax gap rates than unemployment rate. This also means the unemployment rates are lower in each of the five countries than tax gaps. In order to establish statistical relationship between the two variables, a set of hypotheses were set, based on which correlation analysis was performed. The hypotheses are given below:

H<sub>1</sub>: There is a significant relationship between unemployment rate and level of tax evasion.

H<sub>0</sub>: There is no significant relationship between unemployment rate and level of tax evasion.

Based on the hypotheses, the independent variable is unemployment while the dependent variable is tax evasion. This means the researcher measured if controlling unemployment rate as a fiscal budgetary policy has an effect on tax evasion levels. Results from the analysis performed with SPSS has been presented below.

### Descriptive Statistics

	Mean	Std. Deviation	N
Unemployment	10.7880	10.04154	5
Tax Gap	18.0400	8.53276	5

The table above contains results of descriptive statistics, where it is seen that the mean unemployment rate for the five countries is 10.78% as against tax gap rate of 18.04%. Below, correlation analysis results are presented.

### Correlations

		Unemployment	Tax Gap
Unemployment	Pearson Correlation	1	.787
	Sig. (2-tailed)		.114
	N	5	5
Tax Gap	Pearson Correlation	.787	1
	Sig. (2-tailed)	.114	
	N	5	5

From the correlation results, it is seen that there is no significant relationship between unemployment rate and tax gap. This means the null hypothesis cannot be rejected. However, the Pearson correlation between the two variables is a positive one. This is very important for decision making, as it shows that increasing unemployment rate comes with increasing levels of tax gap. Saavedra and Romero explained the potential reason for this by noting that the lesser people have work to do, the more likely it is that they will evade taxes given the low levels of income that unemployment comes with.<sup>17</sup> Also, Nurkholis et al. found that higher unemployment rate in a country is a general indication to taxpayers that

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<sup>17</sup> S. Saavedra & M. Romero, *Local incentives and national tax evasion: The response of illegal mining to a tax reform in Colombia*, *European Economic Review*, 138, 2021.

government is not creating enough jobs with the taxes paid, therefore creating an apathy among them when paying taxes.<sup>18</sup>

### *Influence of Inflation on Tax Gap*

The last sub-theme looked at the influence of inflation as an independent variable on tax gap as a dependent variable. The researcher investigated if fiscal dubetary polices that are aimed at reducing inflation can positively impact on efforts to decrease the tax gap. This sub-theme was set against the premise that higher inflation creates hardship for individuals and businesses, therefore forcing them to find ways of retaining more income through tax evasion.<sup>19</sup> The table below shows the data for inflation rate for 2022 as against tax gap for the give countries.

**Table 4: Inflation rate and tax gap<sup>20</sup>**

Country	Inflation rate	Tax gap
UK	11.1%	6.2%
USA	6.5%	16%
South Africa	6.9%	30%
Brazil	9.3%	18%
China	1.97%	20%

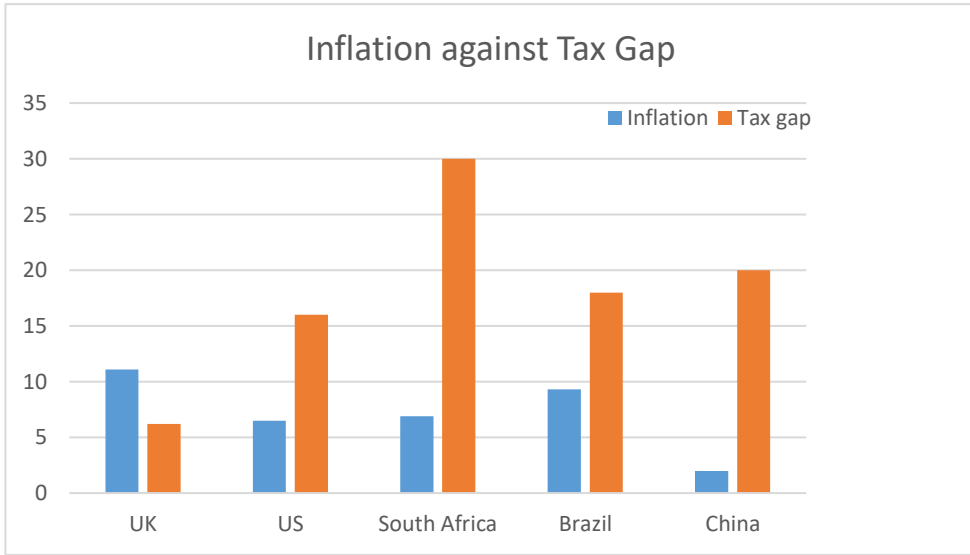
From table 4, it would be noted that UK, which has the lowest tax gap happens to have the highest inflation rate. South Africa with the highest tax gap meanwhile is among countries with the lowest inflation rate. The figure below gives pictorial representation of the data.

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<sup>18</sup> N. Nurkholis, M. Dularif, & N.W. Rustiarini, *Tax evasion and service-trust paradigm: A meta-analysis*. Cogent Business & Management, 7(1), 2020.

<sup>19</sup> S.Khalil & Y. Sidani, *Personality traits, religiosity, income, and tax evasion attitudes: An exploratory study in Lebanon.*, Journal of International Accounting, Auditing and Taxation, 47, 2022.

<sup>20</sup> *Inflation rate: Countries*, Trading Economics, 2023,  
<https://tradingeconomics.com/country-list/inflation-rate>



**Figure 4: Comparison between inflation rate and tax gap**

Figure 4 shows that with the exception of UK, all the other countries have higher tax gap rates than inflation. This however does not give a clear indication about the statistical relationship between the variables. A correlation analysis was therefore necessitated, the results of which have been presented below.

### Descriptive Statistics

	Mean	Std. Deviation	N
Inflation	7.1540	3.44755	5
Tax Gap	18.0400	8.53276	5

From the descriptive statistics, it would be noted that the mean inflation rate for the five countries is 7.15% as against tax gap rate of 18.04%. The correlations below give clearer understanding about the relationship between the two variables. The correlation analysis was conducted with the hypotheses below:

H<sub>1</sub>: There is a significant relationship between inflation rate and level of tax evasion.

H<sub>0</sub>: There is no significant relationship between inflation rate and level of tax evasion.

Based on the hypotheses, the independent variable is inflation while the dependent variable is tax evasion. This means the researcher measured if controlling inflation rate as a fiscal budgetary policy has an effect on tax evasion levels.

**Correlations**

		Inflation	Tax Gap
Inflation	Pearson Correlation	1	-.499
	Sig. (2-tailed)		.393
	N	5	5
TaxGap	Pearson Correlation	-.499	1
	Sig. (2-tailed)	.393	
	N	5	5

There are two main indications from the correlation results above. The first is that there is no statistically significant relationship between inflation rate and tax gap. This means the null hypothesis cannot be rejected. The second indication is that the correlation between inflation rate and tax gap is negative. This implies increasing inflation rate comes with a decreasing tax gap. This result is contrary to what proponents of the preventive approach to tax fraud propose. From the result, higher inflation rate rather reduces tax gap. On their part, Nurkholis et al. explained the mechanism for such an outcome, noting that increasing inflation could generally be a sign of booming economy.<sup>21</sup> By inference, the more the economy grows, the more individuals and businesses have disposable income to spare.<sup>22</sup> When the income levels of individuals and businesses are high to trigger higher spending, they develop positive attitude towards the payment of taxes.

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<sup>21</sup> Ibid 17.

<sup>22</sup> Ibid 6.

## Conclusion

Issues of tax fraud and money laundering continue to affect all countries around the world. Due to the negative impact of the practices on economic growth, governments take various steps at curbing it. It is regrettably to find however that regardless of the series of efforts that are made towards the fight against tax fraud and money laundering, the practices continue to be on the rise in most countries. This has prompted various researchers to look at the dynamics involved with the different approaches to addressing the menace to determine which of them is most effective addressing the situation. Available studies show two general approaches towards the fight against tax fraud and money laundering. These two are the punitive approach and preventive approach. The punitive approach generally seeks to punish culprits with the goal of making the offense deterrent to others. The preventive approach on the other hand emphasize on putting structures and systems in place to prevent tax fraud and money laundering offenses from taking place all together. Through a quantitative secondary research method, this study explored the preventive approach in detail by investigating the impact of using fiscal budgetary policy as a modality for preventing incidents of tax fraud and money laundering. The study places specific emphasis on the tax fraud and money laundering offense of tax evasion.

A systematic search for data was conducted to examine the impact of three main fiscal budgetary policies on people and businesses, which are tax cuts, unemployment rate, and inflation rate. The levels of these three fiscal budgetary policies were quantitatively measured for five countries across five continents, which are South Africa, United States, UK, China, and Brazil. This was then correlated with levels of tax evasion in the said countries. The results have showed that for all three independent variables, which are tax burden, unemployment rate and inflation rate, there is no statistically significant relationship with tax gaps. In effect, the preventive approach to tax fraud cannot be said to be effective in the five countries if policy makers target tax burden, unemployment rate and inflation. For the three independent variables also, the relationship that tax burden and inflation rate has on tax gap is negative. This means when policy makers target increasing these two through vibrant economic growth, they can achieve lowered tax gap even though the impact will not be statistically significant. In terms of unemployment, there is a positive relationship. This means policies must focus on reducing unemployment if tax gaps can be reduced to some extent, even though the reduction may

not be significant. On the whole, it would be concluded that the preventive approach to tax fraud is also not effective for tax burden, unemployment and inflation. This indicates the need to further research into other variables under fiscal budgetary policies or the use of punitive approaches to reducing tax fraud.

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